



CalOptima Health

Provider Portal Training

Our Mission

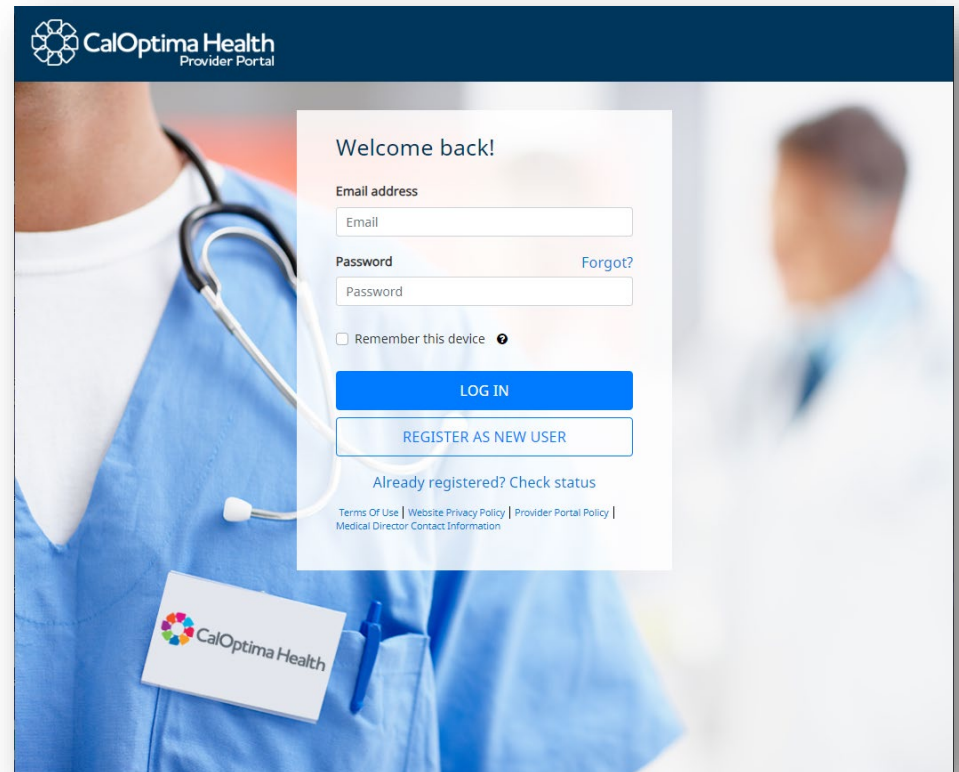
To serve member health with excellence and dignity, respecting the value and needs of each person.

Our Vision

By 2027, remove barriers to health care access for our members, implement same-day treatment authorizations and real-time claims payments for our providers, and annually assess members' social determinants of health.

Welcome

- The Provider Portal is a secure online website where you have access to CalOptima Health 24 hours a day, 7 days a week. With a secure username and password, authorized provider users can:
 - View Member Eligibility
 - Check Claims History
 - Check Authorization Status
 - Submit Referrals
 - View Reports



Purpose of This Training

- CalOptima has launched a new care management system.
- To familiarize new users with the features of CalOptima Health's Provider Portal. In this training you'll learn about:
 - Account and Security Features
 - Searching Member Information
 - Searching Claims Information
 - Viewing Claim Details
 - Submitting Referrals
 - Viewing Referral Details
 - Viewing Reports
- This training provides an overview of the Provider Portal features. For detailed instructions on how to complete specific tasks, please refer to the [Provider Portal User Guide](#) available at caloptima.org.

Account and Security Features

- There are two types of user accounts: Staff and Local Office Administrator (LOA).
 - Staff are able to search for members, claims and referrals as well as enter referrals depending on their security settings. PCPs can access these features and view reports.
 - The LOA controls security roles and responsibilities for the users in their office.
- Security Settings
 - View Member Eligibility
 - View Claims History
 - View Referrals
 - Submit Referrals
 - View Reports

The screenshot displays the CalOptima Health Provider Portal interface. The main content area shows a table of users with columns for Name, Status, Role, and Name. The 'Local Office Admin' role is highlighted. A modal window is open, showing the 'Security Settings' for the 'Local Office Admin' role. The 'Authorized by' field is filled with a name and the 'Date' is 01/10/24. The 'Position' is 'Physician'. The 'Security Settings' table lists various permissions, all of which are checked:

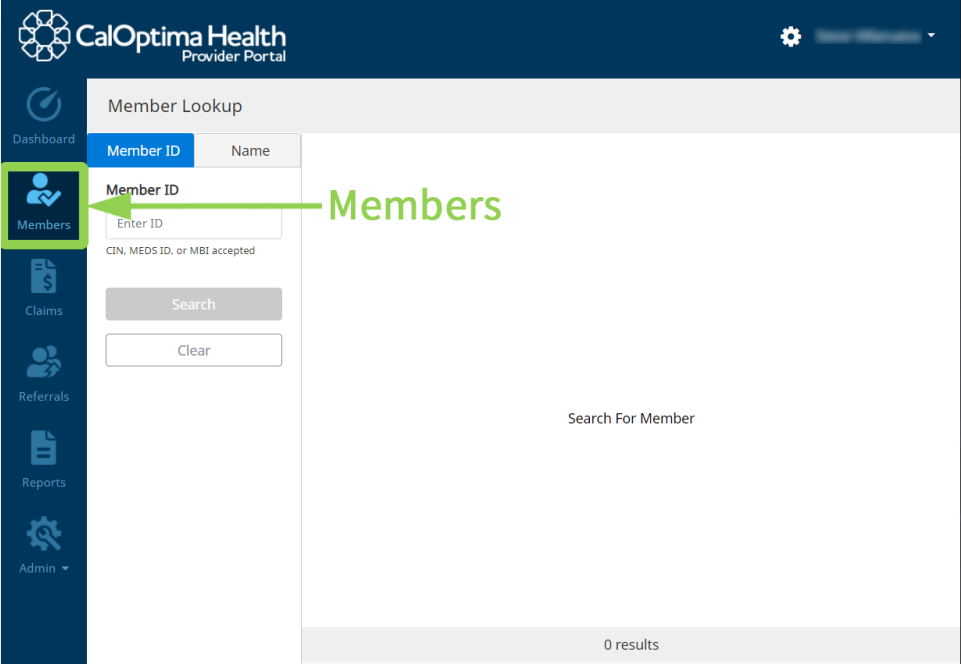
User Role	Security Settings
Eligibility Viewer	<input checked="" type="checkbox"/> Manage User Permission
Claims Viewer	<input checked="" type="checkbox"/> View Member Eligibility
PCP	<input checked="" type="checkbox"/> View Condition History
Custom Setup	<input checked="" type="checkbox"/> View Claims History
Local Office Admin	<input checked="" type="checkbox"/> View Referrals
	<input checked="" type="checkbox"/> View Labs
	<input checked="" type="checkbox"/> View Medications
	<input checked="" type="checkbox"/> Submit Referrals
	<input checked="" type="checkbox"/> View Reports

At the bottom of the modal, there are 'Cancel' and 'Save' buttons.

Searching Member Information

Member Search Options

- On the left navigation panel, click **Members**.
- To search for member information, use either the **Member Identification Number** (Member ID) or the **Member Name**.
- ONLY Provider users associated with the member at the primary care provider (PCP) or group level can view member information due to PHI sensitivity.

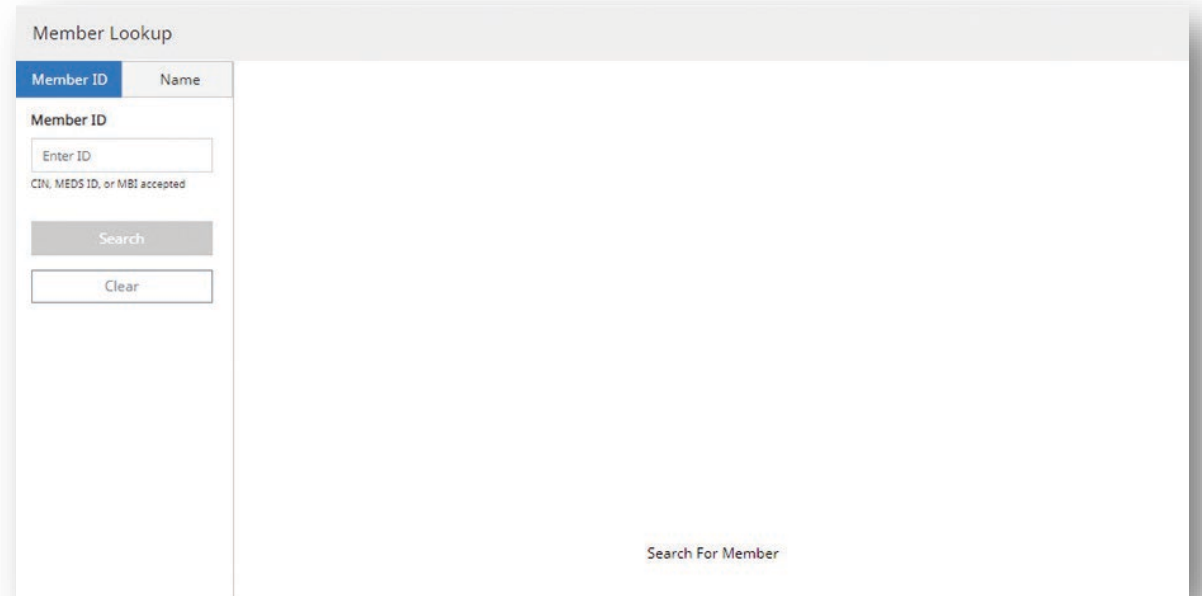


The screenshot shows the CalOptima Health Provider Portal interface. On the left is a dark blue navigation sidebar with icons for Dashboard, Members, Claims, Referrals, Reports, and Admin. The 'Members' icon is highlighted with a green box. A green arrow points from the word 'Members' in the text to this icon. The main content area is titled 'Member Lookup' and features a search form with two tabs: 'Member ID' (selected) and 'Name'. The 'Member ID' tab contains an input field labeled 'Enter ID' with a note below it: 'CIN, MEDS ID, or MBI accepted'. Below the input field are 'Search' and 'Clear' buttons. The search results area is currently empty, displaying 'Search For Member' and '0 results' at the bottom.

Searching Member Information (Cont.)

Enter the Member ID

- Select **Member ID** tab
- Please note that the Member ID is also referred to as the **CalOptima ID Number (CIN)**
- Click **Search**

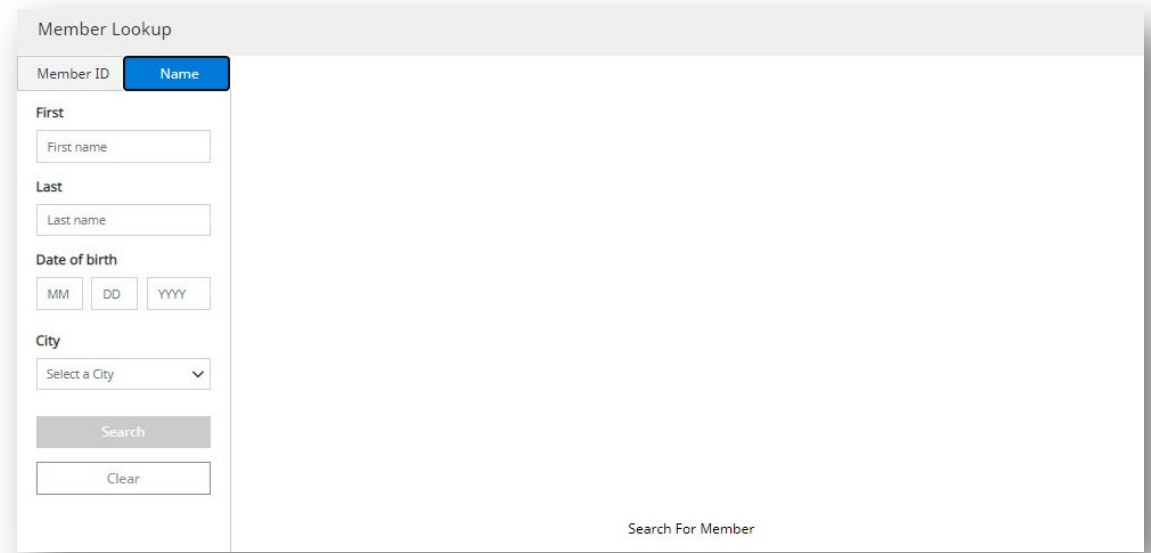


The screenshot displays a web interface titled "Member Lookup". It features two tabs: "Member ID" (which is selected and highlighted in blue) and "Name". Below the tabs, there is a section labeled "Member ID" containing a text input field with the placeholder text "Enter ID". Below the input field, a note states "CIN, MEDS ID, or MBI accepted". There are two buttons: a grey "Search" button and a white "Clear" button with a grey border. At the bottom right of the interface, there is a link that says "Search For Member".

Searching Member Information (Cont.)

Enter the Member Name

- Click on **Name** tab
- Enter **First Name**, **Last Name**, **Date of Birth** and **City**
- Click **Search**



The screenshot shows a web interface titled "Member Lookup". At the top, there are two tabs: "Member ID" and "Name", with "Name" being the active tab. Below the tabs, the form is organized into sections: "First" with a text input field labeled "First name"; "Last" with a text input field labeled "Last name"; "Date of birth" with three separate input fields for "MM", "DD", and "YYYY"; and "City" with a dropdown menu labeled "Select a City". At the bottom of the form, there are two buttons: "Search" and "Clear". In the bottom right corner of the interface, the text "Search For Member" is visible.

Member Information

Member Listing

- The member matching the search criteria is displayed. To access the member information, click on the blue box on the right.

The screenshot displays the 'Member Lookup' interface. On the left, there is a search form with a 'Member ID' field containing 'XXXXXXXX', a 'Search' button, and a 'Clear' button. The main area shows the search results for an 'ELIGIBLE' member. The member's details are as follows:

MEMBER	Date of birth:	99/99/9999
MEDI-CAL	Gender:	Female
CIN: DEFAULT01	Line of business:	Medi-Cal
	Health network:	Health Network
	PCP Name:	Primary Care Physician
	Effective date:	99/99/9999 - Current

A blue box with a share icon is circled in green, and a callout box points to it with the text: 'Click to access member face-sheet'.

Member Information (Cont.)

Member Information Displayed

- Member Demographic Information
 - Some information is hidden if the member isn't associated with the provider at PCP level.
- Eligibility
 - Eligibility history can be displayed by clicking on the blue [Eligibility History](#) button.
- Claim History
 - Dates of service, Diagnoses, and Provider Services.
- Referrals
 - Member's referrals which can be sorted by Most Recent, Status, Code, or Provider.
- Labs
 - Lab results, including Lab Date and Results.
- Medications
 - A list of prescriptions and information therein.

The screenshot displays the CalOptima Health Provider Portal interface. The top navigation bar includes the CalOptima Health logo, the text 'Provider Portal', and an 'Organization' dropdown menu. A search bar for 'Member ID' is located in the top right. The main content area is titled 'Facesheet' and features a sidebar with navigation icons for Dashboard, Members, Claims, Referrals, Reports, and Admin. The 'Eligibility' tab is selected, showing a summary: 'Member is currently Eligible'. Below this, a table lists member details: Line of business (Medi-Cal), Health network, Eligibility date (08/16/2021 - Current), Other health care insurance (None), PCP ID, PCP name, AID category, and AID code. A blue button labeled 'Eligibility History' is highlighted with a green circle and a callout box.

Eligibility History
button

Searching Claims Information

Claims Search Options

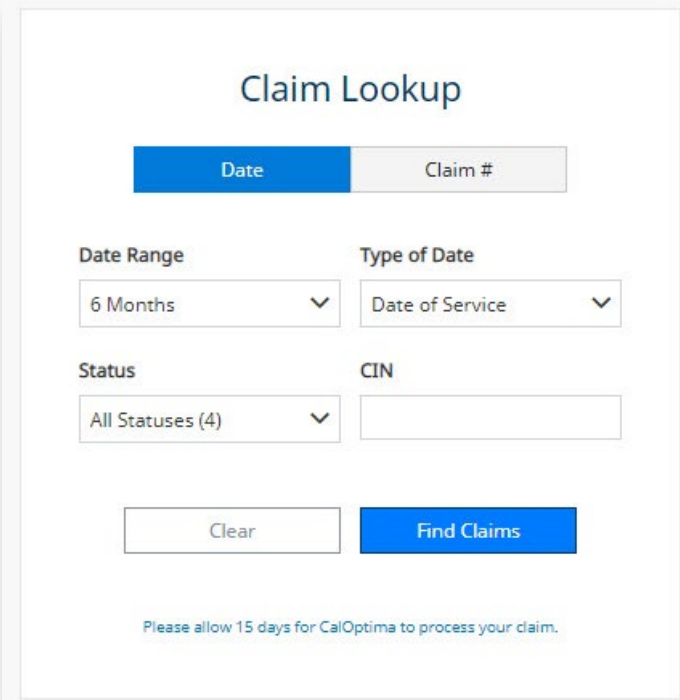
- On the left navigation panel, click **Claims**.
- To search for claim information, use either the **Date** or the **Claim Number**.
- When searching for claims, only claims relating to your provider or group for the past two years will display.

The screenshot displays the CalOptima Health Provider Portal interface. The top navigation bar includes the CalOptima Health logo, the text 'CalOptima Health Provider Portal', and an 'Organization:' dropdown menu. Below the navigation bar, there are two tabs: 'Claims Lookup' (active) and 'Claims Reconciliation'. The left sidebar contains a navigation menu with icons for Dashboard, Members, Claims (highlighted with a green circle), Referrals, Reports, and Admin. The main content area is titled 'Claim Lookup' and features a search form with the following fields: 'Date' and 'Claim #' (input fields), 'Date Range' (dropdown menu set to '3 Months'), 'Type of Date' (dropdown menu set to 'Date of Service'), 'Status' (dropdown menu set to 'All Statuses (4)'), and 'CIN' (input field). At the bottom of the form are 'Clear' and 'Find Claims' buttons. A green callout box labeled 'Claims' points to the 'Claims' icon in the navigation menu.

Searching Claims Information (Cont.)

Claims Search by Date

- Click on **Date** tab
- Enter the **Date Range**, **Type of Date**, **Status** and **CIN**
- Click **Find Claims**



The screenshot displays the 'Claim Lookup' interface. At the top, there are two tabs: 'Date' (highlighted in blue) and 'Claim #'. Below the tabs, there are four search filters arranged in a 2x2 grid:

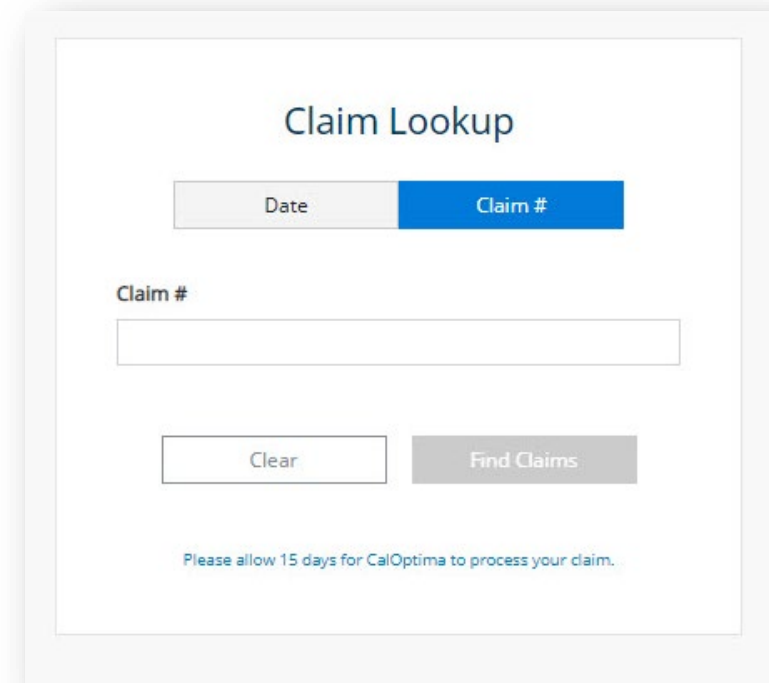
- Date Range:** A dropdown menu with '6 Months' selected.
- Type of Date:** A dropdown menu with 'Date of Service' selected.
- Status:** A dropdown menu with 'All Statuses (4)' selected.
- CIN:** An empty text input field.

At the bottom of the form, there are two buttons: 'Clear' and 'Find Claims' (highlighted in blue). Below the buttons, a small note reads: 'Please allow 15 days for CalOptima to process your claim.'

Searching Claims Information (Cont.)

Claims Search by Claim

- Click on **Claim #** tab
- Enter the **Claim Number**
- Click **Find Claims**



The screenshot shows a web interface titled "Claim Lookup". At the top, there are two tabs: "Date" and "Claim #", with "Claim #" selected. Below the tabs is a text input field labeled "Claim #". At the bottom of the form, there are two buttons: "Clear" and "Find Claims". Below the buttons, there is a small blue text note: "Please allow 15 days for CalOptima to process your claim."

Claims Detail Information

Claims Selection

- To view the details of a claim, click the **Claim Number** or the blue **Search icon** located on the Claims Search Results.
- For more details about the Remittance Advice, click on the green **RA** button in the far-right column.
 - RA will show for claims paid as of last check run.

The payable amount may not reflect the final claims payment. Please review the Remittance Advice (RA) for final claims detail.

Status	Claim Number	Member Name	CIN	DOS	Billed/Payable	Check	
Finalized	999999999999	CALOPTIMA MEMBER	XXXXXXXX	04/05/21	\$150.00 / \$88.46	RA	

1 results

The screenshot shows a table with columns: Status, Claim Number, Member Name, CIN, DOS, Billed/Payable, and Check. A single row is visible with the status 'Finalized', claim number '999999999999', member name 'CALOPTIMA MEMBER', CIN 'XXXXXXXX', DOS '04/05/21', and Billed/Payable amount '\$150.00 / \$88.46'. In the 'Check' column, there is a green button labeled 'RA' and a blue search icon. Three callout boxes with green borders point to these elements: 'Claim Number' points to the claim number cell, 'RA button' points to the green 'RA' button, and 'Search icon' points to the blue search icon.

Claims Detail Information (Cont.)

Claims Information Displayed

- Services
- Member Info
 - Member Information
 - Health Network
 - Contact Information
- Providers
 - Payment Provider
 - Service Provider
- Diagnosis

The screenshot displays a claims detail page with a navigation bar at the top containing a 'Back' button and a 'Claim #' field. Below the navigation bar, there are several key dates and a check number: CIN, Date of service (04/05/21), Date received (04/19/21), Date paid (04/23/21), and Check # (9999999). A tabbed interface shows 'Services' as the active tab, with other tabs for 'Member Info', 'Providers', and 'Diagnosis'. The 'Services' section contains a table with columns for Start Date, End Date, Code, Modifiers, Billed Qty, Billed Amount, and Payable. A single row of service data is shown, followed by a 'TOTAL' row. A note at the bottom states: 'The payable amount may not reflect the final claims payment. Please review the Remittance Advice (RA) for final claims detail.'

Start Date	End Date	Code	Modifiers	Billed Qty	Billed Amount	Payable
04/05/21	04/05/21	J1050		150	\$150.00	\$88.46
TOTAL:					\$150.00	\$88.46

Creating a New Referral

Creating Referral

- User requires LOA access to create referrals.
- On the left navigation panel, click **Referrals**.
- Click on the **Create Referral** button.

NOTE: All referrals are subject to the member's eligibility and if approved, providers will be granted 180 days to render services.

The screenshot displays the CalOptima Health Provider Portal interface. At the top, the logo and 'Organization:' dropdown are visible. The main navigation bar includes 'Create Referral', 'Referral Lookup', 'Submit ADT', and 'ADT Lookup'. The left sidebar contains navigation options: Dashboard, Members, Claims, Referrals, Reports, and Admin. The 'Referrals' menu item is highlighted with a green circle. The main content area shows a 'Submit a Referral' progress bar with six steps: 1. About, 2. Referring Provider, 3. Referred To Provider, 4. Medical Info, 5. Clinical Attachments, and 6. Review. The first step, '1 ABOUT THE REFERRAL', is active. It contains two questions: '1a. What type of referral is this?' with radio buttons for 'Medical (For services NOT related to BH)' (selected) and 'Behavioral Health'; and '1b. Who is this referral for?'. Below this is a 'Find a Member' section with input fields for 'Member ID' and 'Name', and a 'Search for Member' button. A 'Create Referral button' callout points to the 'Create Referral' button in the top navigation bar, and a 'Referrals' callout points to the 'Referrals' menu item in the left sidebar.

Submitting Referrals

There are six sections to complete to Submit a Referral

- Select Referral Type and Member
- Select Referring Provider
- Select Referred To Provider
- Enter Medical Information
- Attach Clinical Documents
- Review

Submit a Referral

1 About 2 Referring Provider 3 Referred To Provider 4 Medical Info 5 Clinical Attachments 6 Review

About the Referral

This referral is a ROUTINE Referral Only. For URGENT Referrals, read below.

⚠ At this time we are unable to accept urgent request via this portal. Please fax an Authorization Request Form (ARF) and pertinent clinical information to:
For Urgent Transplant Request: 714-796-6616
For Non-Emergency Medical Transportation: 714-571-2424
For Behavioral Health Urgent Prior Authorization Request: 714-481-6453
All Other Urgent Requests: 714-338-3137

1a. What type of referral is this?

Medical (For services NOT related to BH)

Behavioral Health

Cancel Next

Submitting Referrals (Cont.)

Select Type of Referral and Member

- Referral Type
 - Medical - Services NOT related to Behavioral Health (BH)
 - Behavioral Health – Services NOT related to Medical and RX Auths.
- Member
 - Find a member by using the Name or Member ID (CIN, MEDS ID or MBI accepted)

1 ABOUT THE REFERRAL

1a. What type of referral is this?

Medical (For services NOT related to BH)

Behavioral Health

1b. Who is this referral for?

Find a Member

Member ID Name

Member ID

Enter ID Search for Member

CIN, MEDS ID, or MBI accepted

Cancel Next

Submitting Referrals (Cont.)

Member Selection

- **Medical Outpatient Authorizations** can be referred only on behalf of the eligible members with CalOptima Direct (COD) or CalOptima Community Network (CCN).
 - **For OneCare wrap services, select the Member's Medi-Cal LOB segment.**
- **Behavioral Health Authorizations** can be referred on behalf of the eligible members
- ONLY users associated with the member at the PCP or group level can view member information.

Find a Member

Member ID Name

Member ID

CIN, MEDS ID, or MBI accepted

Select a Member

Note: Choosing the incorrect member will result in having to start the referral over.

	<input type="text"/> CIN: 9 DOB: Orange, CA 92868	LOB: Medi-Cal	HN: CalOptima Direct Dual <input checked="" type="radio"/>
	JOHN DOE CIN: DOB: Orange, CA 92868	LOB: OneCare	HN: Optum Care Network - Monarch <input type="radio"/>

Medi-Cal LOB segment

Submitting Referrals (Cont.)

Authorization Notes

- ONLY users associated with the member at the PCP or group level can view member information.

Submitting Referrals (Cont.)

Referring Provider Information

- Select the referring provider
 - Referring provider must be in your office
 - Choose the group or the office you want to make the authorization (service address)
 - Selecting incorrect provider will result in having to start the referral over

2. Who is the referring provider?

Find a Provider

Enter one of the fields below to filter your search results.

Provider Name Provider ID Provider Specialty

Select a Provider

Note: Choosing the incorrect provider will result in having to start the referral over.

You have selected [Redacted] Sort by: Name

	Name	Specialty	Address & Phone Number	City
<input type="radio"/>	[Redacted]	Nurse Practitioner	[Redacted]	Santa Ana
<input type="radio"/>	[Redacted]	Physician Assistant	[Redacted]	Santa Ana
<input type="radio"/>	[Redacted]	Family Medicine	[Redacted]	Orange
<input checked="" type="radio"/>	[Redacted]	Internal Medicine	[Redacted]	Huntington Beach

Submitting Referrals (Cont.)

Referred To Provider

- To find a provider, search using the provider's name, provider ID or provider specialty (e.g., orthopedic surgery).
- Select from list displayed of contracted providers who accept members based on their age and gender.

3. Who is the Referred To Provider?

Find a Provider

Must enter one of the fields below to search for a provider.

Provider Name

Provider ID

Provider Specialty

Select a Provider

Note: Choosing the incorrect provider will result in having to start the referral over.



You have selected "S [redacted]"

Sort by:

Providers	Specialty	Address & Phone Number	City	Distance
<input checked="" type="radio"/> [redacted]	Durable Medical Equipment	[redacted]	Fountain Valley	NA
<input type="radio"/> [redacted]	Durable Medical Equipment	[redacted]	Orange	0.6 mi

Submitting Referrals (Cont.)

Referred To Provider Cont.

- Warnings may display for the selected provider:
 -  Indicates that the provider is far away
 -  Indicates that the provider is not accepting new patients
- Closed panel providers are also displayed. While closed panel providers do not accept new patients, they do accept current patients.

3. Who is the Referred To Provider?

Find a Provider

Must enter one of the fields below to search for a provider.

Provider Name Provider ID Provider Specialty

Select a Provider

Note: Choosing the incorrect provider will result in having to start the referral over.

You have selected "S [redacted]" Sort by: Name

Providers	Specialty	Address & Phone Number	City	Distance
<input checked="" type="radio"/> [redacted]	Durable Medical Equipment	[redacted]	Fountain Valley	NA
<input type="radio"/> [redacted]	Durable Medical Equipment	[redacted]	Orange	0.6 mi

Submitting Referrals (Cont.)

Medical Information

- Request Date
 - The Request Date is pre-programmed and will always display the day you are filling out the referral.
 - You may select Retro Referral for services previously provided. You will need to change the Service Date to a date prior to the current displayed date.
- Place of Service

4 MEDICAL INFO

4a. When will this referral take place?

Request Date

Routine Referral

Retro Referral

Urgent Referral

4b. What is the Place of Service?

11 - Office

22 - On Campus-Outpt Hospital

12 - Home (highlighted)

lated to BH)

Submitting Referrals (Cont.)

Medical Information Cont.

- Services
 - Enter service and number of units
 - Add up to 20 services
 - Only services that require prior authorizations can be added
- Diagnosis
 - Add up to 20 diagnoses
- Clinical Indications
 - Can also include important information related to request

4c. What service(s) does the member need?

Choose services for Medical (For Services NOT related to BH)

Service Name	Units	Questionnaire
E0630 - PATIENT LIFT HYDRAULIC/MECH INCL SEAT SLING/PAD	2	

Find a Service: patient lift hydraulic

Select a Service: Choose a Service Code

Enter Units: 2

E0630 - PATIENT LIFT HYDRAULIC/MECH INCL SEAT SLING/PAD

4d. What are the ICD codes for this referral?

ICD Code	Description
M13.861	OTHER SPECIFIED ARTHRITIS RIGHT KNEE

Find an ICD Code: M13.862

Select an ICD: M13.862 - OTHER SPECIFIED ARTHRITIS LEFT KNEE

M13.862 - OTHER SPECIFIED ARTHRITIS LEFT KNEE

4e. What are the clinical indications for this referral?

Clinical Indications

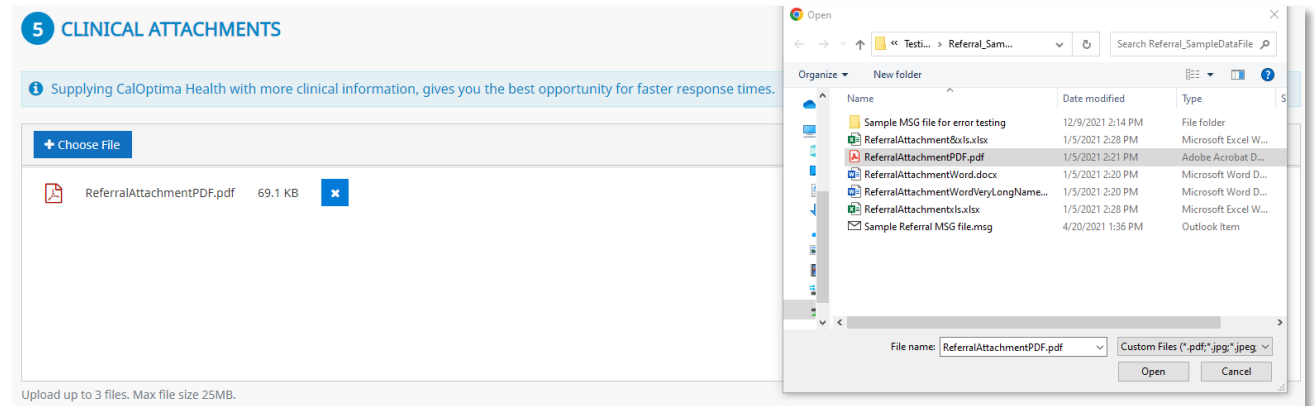
Misdirected referral - 12/5/2022. Refer to supporting document attached for original auth request from Provider Office Medical Group. Primary contact: John Doe (714)555-5555. Patient is wheelchair bound needs assists to get from Bed to chair. Please approve hoyer lift with large sling.

287 / 500 characters

Submitting Referrals (Cont.)

Clinical Attachments

- Supplying CalOptima Health with more clinical information gives you the best opportunity for faster response times
 - You can upload up to 3 files via the Provider Portal UI.
 - The care management system supports unlimited document uploads.
 - Max file size is 25MB



Submitting Referrals (Cont.)

Review and Submit

- Review the referral before submitting
 - Priority
 - Referral Type
 - Member Details
 - Referring Provider
 - Referred To Provider
 - Medical Information
 - Services
 - Diagnosis
 - Clinical Indicators
 - File Attachments

The screenshot displays a 'Medical Info' review screen with an 'Edit' link. It is organized into three main sections: Services, Diagnosis, and Clinical Attachments. The Services section shows a request for '12 - Home Services' with a request date of 12/07/2022 and 2 units of 'E0630 - PATIENT LIFT HYDRAULIC/MECH INCL SEAT SLING/PAD'. The Diagnosis section includes 'Clinical Indications' describing a misdirected referral and 'ICD Codes' for 'M13.861 - OTHER SPECIFIED ARTHRITIS RIGHT KNEE'. The Clinical Attachments section shows a file named 'ReferralAttachmentPDF.pdf' (69.1 KB). At the bottom, there are 'Cancel' and 'Submit Referral' buttons.

Section	Item	Details
Services	12 - Home Services	Request date : 12/07/2022
	E0630 - PATIENT LIFT HYDRAULIC/MECH INCL SEAT SLING/PAD	2 unit(s)
Diagnosis	Clinical Indications	Misdirected referral - 12/5/2022. Refer to supporting document attached for original auth request from Provider Office Medical Group. Primary contact: John Doe (714)555-5555. Patient is wheelchair bound needs assists to get from Bed to chair. Please approve hoyer lift with large sling.
	ICD Codes	M13.861 - OTHER SPECIFIED ARTHRITIS RIGHT KNEE
Clinical Attachments	ReferralAttachmentPDF.pdf	69.1 KB

View Referral Information

Referral Search Options

- On the left navigation panel, click **Referrals**
- On the upper sub-navigation, click **Referral Lookup**
- To search for referral information, use either the **Date** or the **Referral Code**
- When doing referral searches, only referrals relating to your provider organization will display

The screenshot shows the CalOptima Health Provider Portal interface. The top navigation bar includes 'Create Referral', 'Referral Lookup', 'Submit ADT', and 'ADT Lookup'. The left sidebar contains icons for 'Dashboard', 'Members', 'Claims', 'Referrals', 'Reports', and 'Admin'. The 'Referrals' icon is circled in green, and a green arrow points from it to the 'Referral Lookup' tab. The 'Referral Lookup' form contains the following fields:

- Date Range:** A dropdown menu with '3 Months' selected.
- Type of Date:** A dropdown menu with 'Request Date' selected.
- Status:** A dropdown menu with 'All Statuses (3)' selected.
- CIN:** An empty text input field.

At the bottom of the form are 'Clear' and 'Find Referrals' buttons. A note at the bottom of the form reads: 'Please allow 5 days for CalOptima Health to review your request.'

Referral Information Search

Search by Date

- Select **Date Range**, **Type of Date**, **Status** and **CIN**
 - Status has three options: **Open**, **Closed**, or **Voided**
- Click **Find Referrals**

Referral Lookup

Date Referral Code

Date Range **Type of Date**

3 Months ▼ Request Date ▼

Status **CIN**

All Statuses (3) ▼

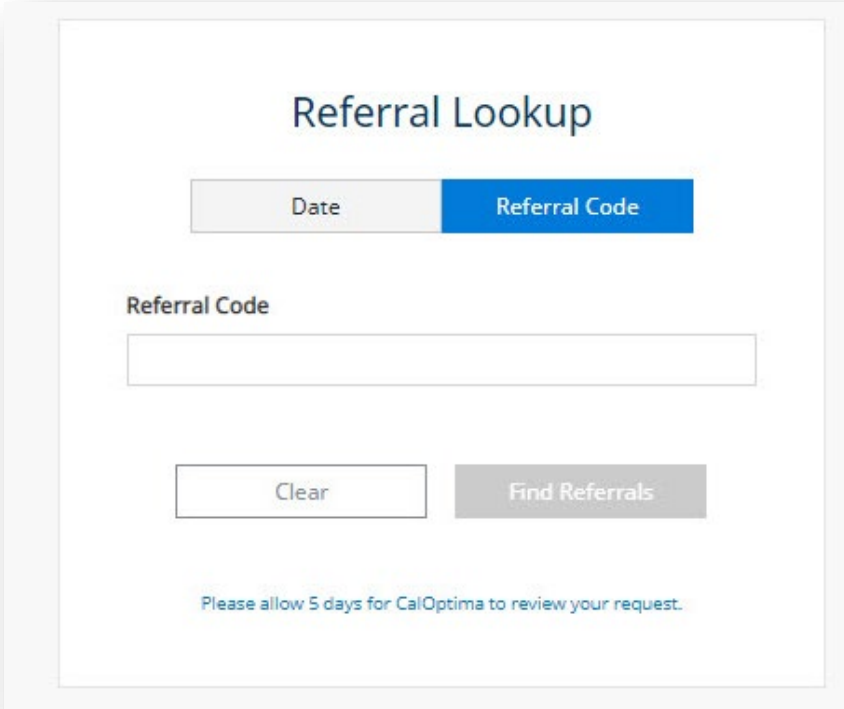
Clear Find Referrals

Please allow 5 days for CalOptima Health to review your request.

Referral Information Search (Cont.)

Search by Referral Code

- Enter the [Referral Code](#)
- Click [Find Referrals](#)



The screenshot shows a web form titled "Referral Lookup". At the top, there are two tabs: "Date" and "Referral Code", with "Referral Code" being the active tab. Below the tabs is a text input field labeled "Referral Code". At the bottom of the form, there are two buttons: "Clear" and "Find Referrals". Below the buttons, there is a small note: "Please allow 5 days for CalOptima to review your request."

Referral Search Results

Referral Listing

- To review referral details, enter the **Referral Code** or click the blue **Search icon** on Referral Search Results.

Status	Code	Member Name	LOB ^	Referred Provider	Requested	
● Pending	RCAA99999	CALOPTIMA MEMBER	Medi-Cal	Medical Doctor	07/16/21	
● Pending	RCA99999	CALOPTIMA MEMBER	Medi-Cal	Medical Doctor	07/16/21	

Referral ID Prefix

- Referral ID starting with “RM” is from Provider Portal.
 - “R” indicates Medical or Pharmacy.
 - “M” indicates Behavioral Health.
- Any other prefix comes from the care management system.

Referral Search Results

Info Bar (All Tabs)

- **Determined** will no longer be available.
- Only when status is other than Pending will we show **Determined On** date.
- **Valid Thru** is based on the duration.

CIN	Priority	Requested	Determined On	Valid Thru	Pending
[Redacted]	Routine	10/05/23	10/06/23	10/05/23 - 04/02/24	Pending

Determined On

Valid Thru

Printable Download (PDF)

A printable version of the referral can be found in the upper-right corner of the gray-bar above all tabs.

- Printable version is in PDF format.
- Printable version will no longer show **Provider Specialty**.

The screenshot displays the CalOptima Health Provider Portal interface. At the top, there are navigation tabs: 'Create Referral', 'Referral Lookup', 'Submit ADT', and 'ADT Lookup'. Below these, a 'Referral #' field is visible with a 'Pending' status indicator. A 'Printable Download' button is circled in green in the upper right corner of the gray bar above the tabs. The main content area shows a detailed view of a referral with the following information:

Referral #:	Priority	Date Requested	Valid Thru	Current Status
R123456789	Retro	9/6/2023	9/5/2023-12/4/2023	Pending

MEMBER INFO

Member Name	XXXXXXXXXXXXXXXXXX
CIN	XXXXXXXXXX
Date of Birth	MM/DD/YYYY (Age 67)
Gender	Male
Spoken Language	Spanish
Written Language	Spanish
Health Network	CalOptima Community Network
Line of Business	Medi-Cal
PCP	XXXXXX Health Center
Eligibility Date	8/1/2022-Current
Address	XXXXXXXXXX
Phone	XXXXXXXXXX
Email	XXXXXXXXXX

PROVIDERS

Referring	XXXXXX Medical Group
Provider ID	XXXXXXXXXX
Address	XXXXXXXXXX
Phone	XXXXXXXXXX
Fax	XXXXXXXXXX
Referred To	XXXXXX Health Center
Provider ID	XXXXXXXXXX
Address	XXXXXXXXXX
Phone	XXXXXXXXXX
Fax	XXXXXXXXXX

MEDICAL INFORMATION

Viewing Referral Details

Referral Tabbed Information

- Services
- Member Information
- Providers
- Diagnosis
- Attachments

The screenshot displays a web interface for viewing referral details. At the top, there is a 'Back' button and a 'Referral #' field with a blurred value. A status indicator shows 'Pending' with a clock icon. Below this, a summary row includes fields for CIN, Priority (Routine), Requested (12/18/23), Determined On (NA), Valid Thru (12/18/23 - 06/15/24), and Printable (Download). A tabbed navigation bar is present with 'Services' selected. The main content area shows 'Clinical Indications' (NA), 'Place of Service' (12 - Home), and a 'Services' table. The 'Services' table has columns for Status, Service, Modifiers, Decision, Description, Duration, Service Units, and Approved Units. A single row is shown with Status 'Pending', Service 'RSTCT', Decision 'BHOPENDSR', Description 'Restricted Display, Confidential service', Duration '12/18/23 - 06/15/24', Service Units '1', and Approved Units '0'. Below the table is a 'Decision Code' section with a table showing Decision Code 'BHOPENDSR' and Decision Description 'Staff Review'.

CIN	Priority	Requested	Determined On	Valid Thru	Printable
	Routine	12/18/23	NA	12/18/23 - 06/15/24	Download

Services	Member Info	Providers	Diagnosis	Attachments
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Clinical Indications
NA

Place of Service
12 - Home

Status	Service	Modifiers	Decision	Description	Duration	Service Units	Approved Units
Pending	RSTCT		BHOPENDSR	Restricted Display, Confidential service	12/18/23 - 06/15/24	1	0

Decision Code	Decision Description
BHOPENDSR	Staff Review

Viewing Referral Details (Cont.)

Services

- Added Place of Service
- Added Decision Description
- Added Description grid
- Will now show:
 - Service Lines
 - Extension Lines
 - Stay Lines (for inpatient authorizations)
- Decision column will now point to Decision Reason Code
- Determined On date will be the last Decision Date for the services

Referral #: [REDACTED] Pending

CIN	Priority	Requested	Determined On	Valid Thru	Printable
[REDACTED]	Routine	12/18/23	NA	12/18/23 - 06/15/24	Download

Services

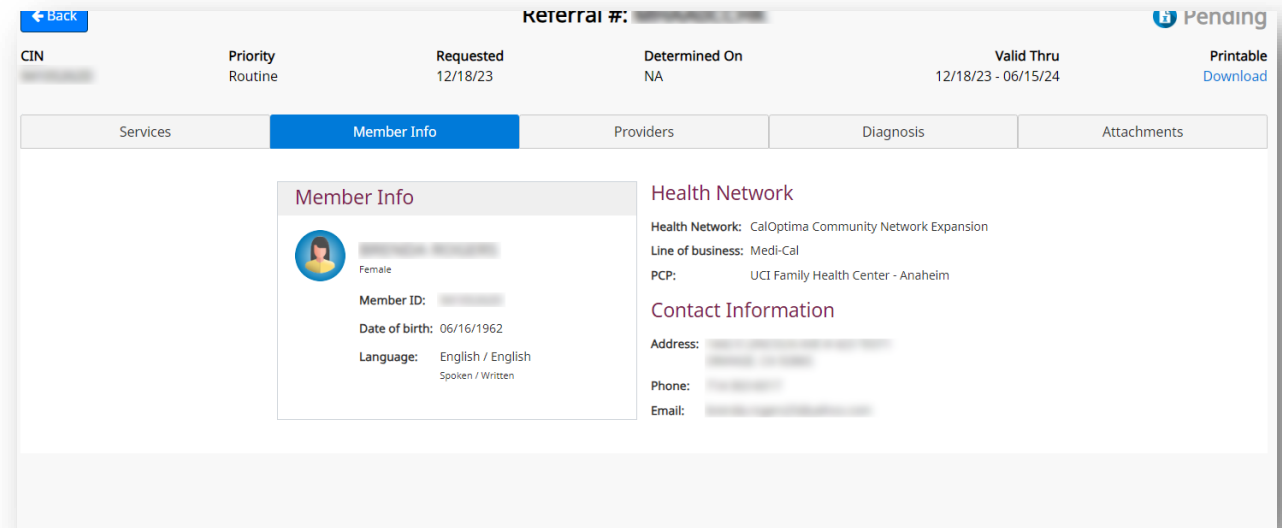
Status	Service	Modifiers	Decision	Description	Duration	Service Units	Approved Units
Pending	RSTCT		BHOPPENDSR	Restricted Display, Confidential service	12/18/23 - 06/15/24	1	0

Decision Code	Decision Description
BHOPPENDSR	Staff Review

Viewing Referral Details (Cont.)

Member Information

- Member Info
- Health Network
- Contact Info




← Back Referral #: [REDACTED] Pending

CIN	Priority	Requested	Determined On	Valid Thru	Printable
[REDACTED]	Routine	12/18/23	NA	12/18/23 - 06/15/24	Download

Services **Member Info** Providers Diagnosis Attachments

Member Info

 [REDACTED]
Female

Member ID: [REDACTED]

Date of birth: 06/16/1962

Language: English / English
Spoken / Written

Health Network

Health Network: CalOptima Community Network Expansion

Line of business: Medi-Cal

PCP: UCI Family Health Center - Anaheim

Contact Information

Address: [REDACTED]

Phone: [REDACTED]

Email: [REDACTED]

Viewing Referral Details (Cont.)

Providers

- Referring Provider
- Referred To Provider
- Data provided by the care management system
- For inpatient authorization, Referring and Referred to provider will be the Facility.

The screenshot displays a web interface for viewing referral details. At the top, there is a navigation bar with a 'Back' button and a 'Pending' status indicator. Below this, a summary row contains the following information: CIN (blurred), Priority Routine, Requested 12/18/23, Determined On NA, Valid Thru 12/18/23 - 06/15/24, and a Printable Download link. A horizontal menu below the summary row includes tabs for Services, Member Info, Providers (which is selected and highlighted in blue), Diagnosis, and Attachments. The main content area is divided into two columns: 'Referring Provider' and 'Referred To Provider'. Each column lists fields for Provider name, Provider ID, Address, Phone, and Fax. The 'Referring Provider' fields show 'Address: NA', 'Phone: NA', and 'Fax: NA'. The 'Referred To Provider' fields show 'Address: [blurred]', 'Phone: [blurred]', and 'Fax: NA'. The bottom of the page features a light gray footer area.

Viewing Referral Details (Cont.)

Diagnosis

- Code
- Description
- Data provided by the care management system

The screenshot displays a web interface for viewing referral details. At the top, there is a 'Back' button and a 'Referral #' field. Below this, a summary row contains the following information: CIN (blurred), Priority (Routine), Requested (12/21/23), Determined On (NA), Valid Thru (12/21/23 - 06/18/24), and Printable (Download). A navigation bar below the summary row includes tabs for Services, Member Info, Providers, Diagnosis (which is highlighted in blue), and Attachments. Under the 'Diagnosis' tab, there is a section titled 'Diagnosis' with a table containing one entry:

Code	Description
W58.1	Contact with crocodile

Viewing Referral Details (Cont.)

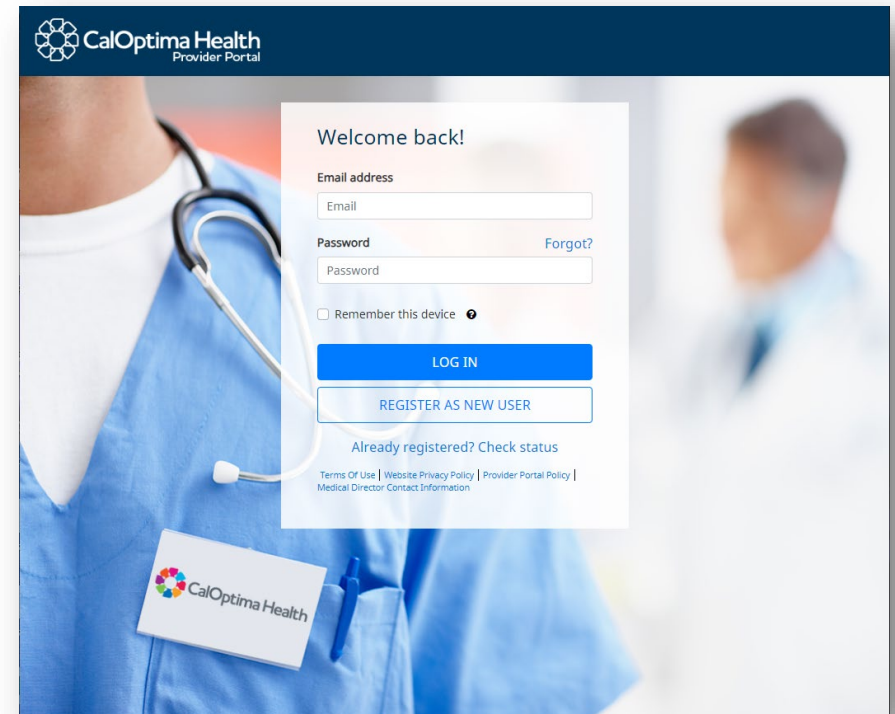
Attachments

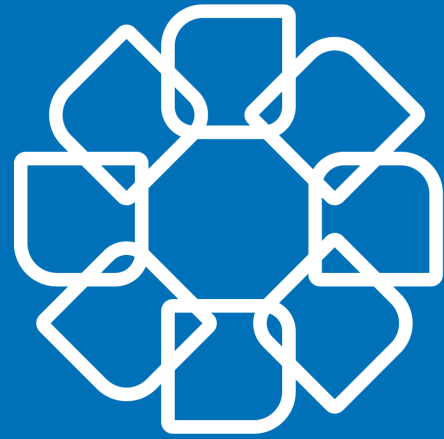
- Displays uploads via care management system AND attachments via Provider Portal
- 3 Documents Max can be uploaded via Provider Portal.

The screenshot displays the CalOptima Health Provider Portal interface. At the top, the navigation bar includes 'Create Referral', 'Referral Lookup', 'Submit ADT', and 'ADT Lookup'. The main content area shows a referral summary for a specific referral number, marked as 'Approved'. Key details include the priority (Routine), requested date (10/05/23), determined on date (10/06/23), and valid through date (10/05/23 - 04/02/24). Below this, a tabbed interface allows navigation between Services, Member Info, Providers, Diagnosis, and Attachments. The Attachments tab is active, showing a list of three PDF files uploaded on 10/05/23. An inset window shows a preview of one of these PDF documents, which appears to be a medical form or report. The bottom of the screen displays various patient and visit details, including Time In/Out, Patient ID Number, Start of Care Date, Visit Date, Episode Start Date, Patient Name, Social Security Number, and Patient Address/Phone Number.

Contact Us

- For general questions about the portal or to change the LOA, please contact CalOptima Health Provider Relations:
 - 714-246-8600 Option #2
 - 888-587-8088 Option #2
- To report suspect or potential security incidents or privacy breaches, please contact:
 - CalOptima Health's Privacy Officer at privacy@caloptima.org or
 - CalOptima Health Compliance and Ethics Hotline at 877-837-4417





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