DESCRIPTION

- **Recommended audience:** All patient-centered medical homes who issue referrals and specialists who receive referrals.

- **Description:** This class will provide instructions as to what information is required for referrals issued by a patient centered medical home provider and provide resolution to common issues surrounding referrals.
DISCLAIMER

• The information provided is current as of April 2019 and is subject to change.

• Stay informed with up-to-date information on the OHCA public website: www.okhca.org.
AGENDA

• Overview.
• Exclusions.
• Guidelines.
• Administrative referrals.
• Claim requirements.
• Find a provider.
• Reminders and resources.
• Questions?
Overview
OVERVIEW

Members enrolled in the SoonerCare Choice program or Insure Oklahoma Individual Plan must have a referral from their primary care provider to see a specialist.
OVERVIEW

Members excluded from SoonerCare Choice include:

• Medicare primary.
• Have TPL coverage – either PPO or HMO.
• In state or tribal custody.
• In a subsidized adoption.
• Residents of a nursing home or an Intermediate Care Facility for Individuals with Intellectual Disabilities.
• Enrolled in a waiver program.
• SoonerPlan.
OVERVIEW

**August 2013**
- Electronic portal referrals required
- Referrals submitted on the SC-10 no longer accepted

**September 2013**
- Electronic portal referrals no longer available

**August 2017**
- Alternative referral methods implemented

**September 2017**
Exclusions
EXCLUSIONS

Referrals are not required for:

• Services provided outside the PCP (medical home) by primary care specialties.
• Child physical and sexual abuse exams.
• Acute hospitals.
• Anesthesia services.
• Emergency room care.
• Outpatient surgeries (facility only).
EXCLUSIONS

- Inpatient hospital admissions including professional services.
- Chemotherapy.
- Diagnostic lab and X-ray services.
- Family planning services.
- Obstetrical care.
- Outpatient behavioral health services.
- Sleep studies and sleep medicine.
EXCLUSIONS

• Dental services.
• PT/OT/ST Audiology services.
• Services provided to a Native American at an IHS/Tribal.
• Optometry.
• Vision services for children.
Guidelines
GUIDELINES

• Referrals are to be initiated for services that are medically necessary, as determined by the PCP.

• The PCP and specialty provider are responsible for maintaining appropriate documentation of each referral to support the claims for medically necessary services.

• Referrals may be written to an individual provider or a group.
GUIDELINES

- Referrals must contain the individual provider’s SoonerCare legacy number.

- Services authorized by the PCP must be within the scope of coverage of the SoonerCare Choice program.

- A PCP referral is not a guarantee of payment.
GUIDELINES

• PCPs may be either a group or an individual.

• The referring provider information for claims processing must belong to an individual, not a group.

• The group provider and referring provider must have an active SoonerCare contract.
GUIDELINES

• Referrals can be issued up to 12 months.

• Referrals from the PCP are required prior to rendering services, except for retrospective referrals that are deemed appropriate by the PCP.

• PCPs can backdate referrals up to six months.
GUIDELINES

• PCPs do not have to see a member before a referral is approved but they may require this.

• Referrals are not the same as prior authorizations.
GUIDELINES

Alternative referral methods consist of, but are not limited to:

- SoonerCare Referral Form (SC-10).
- Paper referrals with required components.
- E-mail referrals with required components.
GUIDELINES

• Electronic referrals submitted through an electronic medical record with required components.

• A printed copy of a referral from an EMR system with required components.

• SoonerCare portal referrals (applicable only to Indian Health/Tribal/Urban Indian Clinics).
GUIDELINES

• Electronic portal referrals are no longer initiated by medical home providers unless the provider is an I/T/U.

• Electronic referrals are still visible to specialty providers.

• Specialists may view electronic portal referrals if sent by an I/T/U provider.
GUIDELINES

Alternative referral methods should include at a minimum:

• **Member information:**
  - Name.
  - SoonerCare ID number.
  - Telephone number.

• **Primary Care Provider information:**
  - Name of primary care provider.
  - Telephone and fax number.
GUIDELINES

• Referring provider information:
  - Name of individual referring provider.
  - SoonerCare ID number and NPI (National Provider Identifier).
  - Original or electronic signature.

• Reason for referral.

• Referral start and end date.
GUIDELINES

• Specialty provider information
  - Name of specialist or group.
  - Address.
  - Telephone and fax number.
SoonerCare/Insure Oklahoma Referral Form

Member Name

Member ID

Member Phone

Member DOR

REFERRED TO:

Provider Name (must be current SoonerCare provider)

Phone

Fax

Provider Address

Referral Valid from date

(Begin date not to exceed 6 months from referral; end date may not exceed 12 months total)

Reason for Referral

MEDICAL PROVIDER

MEDICAL PROVIDER

Name of Referring Provider

Date

Signature of Referring Provider

Referring Provider's NPI Number

(10 digits)

• This referral is valid for all ancillary services related to the above reason for referral within the specified timeframe.
• This referral may be forwarded to other specialists for the above reason for referral with the approval of the PCP/CM.
• Report your findings directly to the provider who made this referral.
• This referral number should be entered by the referred to the provider in the appropriate field on the provider's claim. Use the NPI number for electronic claims and PCP/CM referral number on paper claims.
• All payments for services are subject to coverage limitations under the SoonerCare/Insure Oklahoma program and the referral is not a guarantee of payment.

Instructions

1. Complete and mail/fax the original copy of the form to the provider to whom you are referring.
2. Keep a duplicate copy for your records in the member’s medical chart.
3. Referral form (SC-10) may be obtained on the OHCA website at http://www.okhca.org/provider/forms.asp.

PLEASE DO NOT MAIL OR FAX A COPY TO OHCA.
PLEASE DO NOT ATTACH A COPY TO YOUR CLAIM FORM.

OHCA Form SC-10 effective September 1, 2017

(Updated 9/20/2017)
Administrative Referrals
Administrative referrals are provided by OHCA under special and extenuating circumstances:

- Referred by an I/H/S, Tribal or Urban Indian Clinic.
- Result of an emergency room visit or follow-up.
- Pre-operative facility services, prior to a dental procedure.
PROSPECTIVE REFERRALS

*Prospective* administrative referrals – Reviewed by the OHCA Population Care Management unit.

Approval criteria for prospective administrative referrals:

- The PCP denied the referral request.
- The specialty visit must be urgent.
- The visit must be medically necessary.
RETROSPECTIVE REFERRALS

Retrospective administrative referrals – Reviewed by OHCA Provider Services unit.

Approval criteria for retrospective Administrative Referrals:

- The PCP denied the referral request.
- Must be sent to OHCA Provider Services within 30 days from when the service is rendered.
ADMINISTRATIVE REFERRALS

Administrative Referral Request Process:

• The **SC-14** form is used for prospective or retrospective administrative referrals.

• The PCP must be contacted prior to requesting an administrative referral.

• Approved administrative referrals are issued to the rendering provider.
Return this Form to SoonerCare

Date: ______

- Retrospective Administrative Referral
  Attn: Provider Services Phone: (800) 522-0114 option 1 or (405) 522-6205 option 1
  Fax: (405) 530-3228 | Number of Pages: ___

- Prospective Administrative Referral
  Attn: Care Management Phone: (877) 252-6002 | Fax: (405) 530-3217 | Number of Pages: ___

### SOONERCARE REFERRAL REQUEST

Please complete the information below to document your attempts to obtain a referral from the PCP/CM. Even if the completed form to SoonerCare. Your referral request will be considered and you will receive written notice of approval or denial of any necessary medical records. ALL PAYMENTS FOR SERVICES ARE SUBJECT TO COVERAGE LIMITATIONS UNDER THE CURRENT OKLAHOMA MEDICAID PROGRAM.

<table>
<thead>
<tr>
<th>RENDERING PROVIDER’S NAME:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider #</td>
</tr>
<tr>
<td>Contact Person:</td>
</tr>
<tr>
<td>Address:</td>
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<table>
<thead>
<tr>
<th>PATIENT INFORMATION:</th>
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<tbody>
<tr>
<td>Patient’s name:</td>
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<tr>
<td>Date of Birth:</td>
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<tr>
<td>Gender:</td>
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<tr>
<th>Type of Service:</th>
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<tbody>
<tr>
<td>Office Visit</td>
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<tr>
<td>Surgical</td>
</tr>
<tr>
<td>Durable Medical</td>
</tr>
<tr>
<td>Other:</td>
</tr>
<tr>
<td>Diagnosis codes:</td>
</tr>
<tr>
<td>Date(s) of service:</td>
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<tr>
<td>Contact Person:</td>
</tr>
<tr>
<td>Telephone:</td>
</tr>
</tbody>
</table>

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<tr>
<th>CONTACTS:</th>
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</thead>
<tbody>
<tr>
<td>Date: Result of Contact:</td>
</tr>
<tr>
<td>Date: Result of Contact:</td>
</tr>
</tbody>
</table>
The provider number must belong to the individual specialty provider.
ADMINISTRATIVE REFERRALS

• OHCA will fax a letter if the administrative referral is denied.

• If approved, OHCA sends the provider an electronic letter notice via the provider portal.

• The administrative referral approval letter is only accessed by the individual rendering provider login.
To view the approval notice, select the Letters tab, then click on Provider Letters.
The **SoonerCare Coordination of Care Letter** will show approved administrative referrals.
STATE OF OKLAHOMA
OKLAHOMA HEALTH CARE AUTHORITY

January 23, 2019

Dear [Name],

Your request for an administrative referral has been approved. The referral is as follows:

Member Name:

RID:

Date(s) of Service:

This referral is considered an administrative referral issued by the Oklahoma Health Care Authority for exclusive use on this claim for the dates listed. There will be no referral form and you do not need to enter any specific information on the submitted claim form.

ALL PAYMENTS FOR SERVICES ARE SUBJECT TO COVERAGE LIMITATIONS UNDER THE CURRENT SOONERCARE PROGRAM.

If you have any questions regarding this administrative referral, please call Provider Services at 800-522-0114.

The Oklahoma Health Care Authority
Claim Requirements
CLAIM REQUIREMENTS

• The individual referring provider SoonerCare ID number is required for paper claims.

• Electronic and portal submission claims require the individual referring provider’s NPI.
Paper claims that require a referral:

- 17 – “DN” Qualifier.
- 17a – Individual referring SC provider number.
- 17b – NPI of the individual referring provider.
Portal claims require the individual referring providers NPI.

EDI claims require the individual referring provider NPI in Loop2310A, segment NM1*DM.
Find a Provider
FIND A PROVIDER

Specialty providers can be searched within the provider portal, under the resources tab.

Criteria used to perform the search:
  • Zip Code.
  • Distance.
  • Provider NPI.
  • Provider Type and Specialty.
Select the **resources** tab then **search providers**.
FIND A PROVIDER

Search Provider

- Health Plan: All Health Plans
- Search Type: Distance
- Distance (within): 25 miles
- Zip Code: 73105

Select Provider Criteria

- Provider NPI
- Provider Type: Physician
- Provider Specialty: Laryngology
- Results: 50 per page

Search Provider Button
### Find a Provider

The search results will provide a list of contracted specialists based on the criteria entered.

Some provider specialties may not appear in the search results.

<table>
<thead>
<tr>
<th>Provider</th>
<th>Address</th>
<th>Distance</th>
<th>Phone</th>
<th>Specialty</th>
</tr>
</thead>
<tbody>
<tr>
<td>BISON, RUMBLE</td>
<td>1234 OKLAHOMA WAY OKLAHOMA CITY, OK 71234</td>
<td>2.07 miles</td>
<td>(405) 123-4567</td>
<td>Internist</td>
</tr>
<tr>
<td>SOONER, BOOMER</td>
<td>4321 OKLAHOMA WAY OKLAHOMA CITY, OK 74321</td>
<td>12.96 miles</td>
<td>(405) 123-4567</td>
<td>Laryngology</td>
</tr>
<tr>
<td>PETE, PISTOL</td>
<td>1234 OKLAHOMA WAY SUITE 567 OKLAHOMA CITY, OK 71234</td>
<td>2.60 miles</td>
<td>(405) 123-4567</td>
<td>Otologist, Laryngologist, Rhinologist</td>
</tr>
</tbody>
</table>
Reminders & Resources
REMINDERS

• Always verify member eligibility on the date of service for the date of service.

• Communicate with the PCP on clinical findings.

• Conduct timely follow-ups on claims that are denied for “Specialist Requires a Referral”.
How do I update my provider file?

The Provider Portal allows contracted providers the opportunity to maintain their essential contract information. Administrators and providers can make changes and updates to their provider file through the secure provider portal at ohcaprovider.com.

Input your User ID in the Login box, click the Log In option. On the Welcome screen select the Update Provider Files link on the right side of the page. The SoonerCare Provider Enrollment page will load with the update options available for your contract type.

Providers can update the following:
- banking information
- address and contact information
- EFT and ERA
- add/delete group members
- office information
- view contract types and dates
- complete contract renewal (option will load only when it is time to renew your contract)

How do I schedule SoonerRide?

Use TripCare to schedule non-emergency transportation reservations online. You can view all scheduled trips for your facility for any specified day. TripCare’s dashboard allows you to manage trip requests, reservations, and know which transportation provider is assigned to each reservation. Schedule rides at least three business days before appointment at tripcare Logisticare.com or call 800-435-1276.

How do I verify eligibility using the Eligibility Verification System (EVS)?

In the OKC area, call 405-840-0650, opt. 1 or toll-free, 800-767-3949, opt. 1. You must have the SoonerCare Provider ID Number and EVS PIN. Enter your 9-digit provider number and location code followed by #. Enter your 4-digit EVS PIN followed by #. Available 20 hours a day, 5:00 a.m. to 1:00 a.m. Eligibility can also be checked on the SoonerCare Provider Portal.

Forgot your PIN? See Internet Help Desk option under the OHCA Provider Helpline.

<table>
<thead>
<tr>
<th>Transaction Codes</th>
<th>A = *21</th>
<th>G = *41</th>
<th>M = *61</th>
<th>S = *73</th>
<th>Y = *93</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>B = *22</td>
<td>H = *42</td>
<td>N = *62</td>
<td>T = *81</td>
<td>Z = *12</td>
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<tr>
<td></td>
<td>C = *23</td>
<td>I = *43</td>
<td>O = *63</td>
<td>U = *82</td>
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<td>F = *33</td>
<td>L = *53</td>
<td>R = *72</td>
<td>X = *92</td>
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</tr>
</tbody>
</table>

Prior Authorizations issued by department

<table>
<thead>
<tr>
<th>User/Contact</th>
<th>Phone/Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td>PASRR Level of Care Unit</td>
<td>405-522-713 &amp; 405-522-7674</td>
</tr>
<tr>
<td>Medical Authorizations</td>
<td>405-522-6205, option 6, 3 Toll-Free: 800-522-0114, option 6, 3 <a href="mailto:MAadmin@okhca.org">MAadmin@okhca.org</a></td>
</tr>
<tr>
<td>Durable Medical Equipment</td>
<td><a href="mailto:DMEdesign@okhca.org">DMEdesign@okhca.org</a></td>
</tr>
<tr>
<td>Occupation/Physical/Speech Therapy</td>
<td><a href="mailto:Therapyadmin@okhca.org">Therapyadmin@okhca.org</a></td>
</tr>
<tr>
<td>Dental Authorizations</td>
<td>405-522-7401</td>
</tr>
<tr>
<td>Pharmacy Help Desk College of Pharmacy</td>
<td>405-522-6205 Toll-Free: 800-522-0114 Fax: 405-271-4014 Toll-Free Fax: 800-224-4014</td>
</tr>
<tr>
<td>Personal Care Local County DHS Office</td>
<td>Contact local DHS office</td>
</tr>
<tr>
<td>Advantage Administration Unit</td>
<td>918-933-4900</td>
</tr>
<tr>
<td>Developmental Disabilities Services Division (DDS) Area Office</td>
<td>405-325-5080 Toll-Free: 800-349-9713 Fax: 405-572-6653</td>
</tr>
<tr>
<td>Medically Fragile Waiver OHCA Waiver Staff</td>
<td>Toll-free: 888-287-2443</td>
</tr>
<tr>
<td>Behavioral Health</td>
<td>Toll-free: 800-522-0114</td>
</tr>
</tbody>
</table>

How do I use Electronic Data Interchange (EDI)?

EDI handles processing and troubleshooting of all electronic batch files that are uploaded in the OK Medicaid Provider Portal under files exchange. To submit electronic batch files, you must complete an EDI/ERA Application for Providers and test with special X-12 software, or have a contract with an OK Medicaid clearinghouse that will submit files on your behalf.

EDI accepts electronic batch submissions of 837 (professional, institutional, dental), 270/271, 276/277 and 278 files. Processing of batch files can take an average of 4 hours to process once uploaded in the Provider Portal. The EDI department also processes EDI applications to set up a provider for 835 electronic remittance advices. Contact the EDI Helpdesk at 800-522-0114 for questions or concerns regarding EDI transmission and processing.
Visit our site recently?
Visit the Oklahoma Health Care Authority (OHCA) website at ohca.org for information about the agency, its policies and programs. Be sure to sign up for Web Alerts (ohca.org/webalerts) to stay up to date on the most current information about OHCA and SoonerCare.

Don’t miss out on workshop and webinar opportunities!
OHCA and DXC host a variety of free learning options available for you and your staff. Biannual spring and fall Provider Training Workshops are held in different cities across the state. In addition, monthly webinars on timely topics may be accessed from the convenience of your office. Lastly, bimonthly SoonerCare 101s provide instructor-led training on the basics of SoonerCare in OKC and Tulsa for new providers and billing staff.

For more information, visit ohca.org/provider-training. This Provider Training page features important information about registering for workshops, webinars, trainings, training dates, locations and class descriptions.

SoonerCare education specialists are available to assist you . . .
SoonerCare education specialists are available for one-on-one and group training for providers and health-related community workgroups and coalitions. Education specialists can answer questions about OHCA policy, programs and procedures as well as claim issues and navigating the secure SoonerCare Provider Portal. Training can be conducted on-site, through virtual visits, at the training facility in OKC or other appropriate venues.

Please include the provider’s name, SoonerCare ID number, a return phone number and a contact name with your request.

Send training requests to:
Email: SoonerCareEducation@ohca.org
Phone: 405-522-7422
Fax: 405-530-3288

To schedule training, please email SoonerCareEducation@ohca.org or call 405-522-7422. You may also fax your request to 405-530-3288. For immediate claims or policy assistance, please call the OHCA Provider Helpline at 800-522-0114.

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**OHCA Provider Helpline**
Toll-Free: 800-522-0114  Oklahoma City Area: 405-522-6205

<table>
<thead>
<tr>
<th>Option</th>
<th>Unit</th>
<th>Hours</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>OHCA Call Center</td>
<td>8 a.m. - 5 p.m. Mon-Fri</td>
</tr>
<tr>
<td>2, 1</td>
<td>Internet Help Desk (SoonerCare Provider Portal)</td>
<td>8 a.m. - noon &amp; 1-5 p.m. Mon-Fri</td>
</tr>
<tr>
<td>2, 2</td>
<td>EDI Help Desk (batch transactions)</td>
<td>8 a.m. - noon &amp; 1-5 p.m. Mon-Fri</td>
</tr>
<tr>
<td>3, 1</td>
<td>Adjustments (claims)</td>
<td>7:30 a.m. - 4 p.m. M, W, Th, F Noon - 4 p.m. Tues</td>
</tr>
<tr>
<td>3, 2</td>
<td>Third Party Liability</td>
<td>8 a.m. - 5 p.m. Mon-Fri</td>
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<tr>
<td>4</td>
<td>Pharmacy Help Desk (issues)</td>
<td>8 a.m. - 7 p.m. Mon-Fri 9 a.m. - 5 p.m. Sat 11a.m-5 p.m. Sun</td>
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<tr>
<td>5</td>
<td>Provider Contracts</td>
<td>8 a.m. - 5 p.m. M, Tu, Th, F 1 p.m. - 5 p.m. Wed</td>
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<tr>
<td>6, 1</td>
<td>Pharmacy Help Desk (authorizations)</td>
<td>8:00 a.m. - 7 p.m. Mon-Fri 9 a.m. - 5 p.m. Sat 11a.m - 5 p.m. Sun</td>
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<td>Behavioral Health Authorizations (OP)</td>
<td>8 a.m. - 5 p.m. Mon-Fri</td>
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<td>6, 2, 2</td>
<td>Behavioral Health Authorizations (IP)</td>
<td>8 a.m. - 5 p.m. Mon-Fri</td>
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<td>6, 3</td>
<td>Medical Authorizations (status only)</td>
<td>8 a.m. - 5 p.m. Mon-Fri</td>
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<td>6, 4</td>
<td>Prior Authorizations (PAs)</td>
<td>8 a.m. - 5 p.m. Mon-Fri</td>
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<tr>
<td>6, 5</td>
<td>Dental Authorizations</td>
<td>8 a.m. - 5 p.m. Mon-Fri</td>
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</tbody>
</table>
PROVIDER RESOURCES

Policy and claims related questions may be answered by the OHCA Provider Services unit at:

Toll-Free: 800-522-0114
Oklahoma City Area: 405-522-6205
For onsite training requests, contact the SoonerCare education team.

E-mail: SoonerCareEducation@okhca.org
Phone: 405-522-7422
Fax: 405-530-3288

*Please include the provider’s name, SoonerCare ID number, a return phone number and a contact name with the request.