Affiliate Link Community User Quick Start Guide

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View a patient's demographics

Select the **Clinicals** tab and click **Patient Profile > Demographics**. A report appears with demographic information like the patient's address, PCP, and more.
View a patient's billing information

To view information about the patient's eligibility for health plans, coverages, service areas, networks, and more, select the **Clinicals** tab and click **Patient Profile > Eligibility & Benefits**. You can expand and collapse the sections in the Services section and use the Jump to search bar to find specific services.

You can also see details about a particular coverage on the Benefits Summary page to:

- Determine whether a particular service is covered in or out of network.
- Determine whether a coverage is active.
- Determine whether benefits for a particular service are metered and what the limits are for each level of benefits.
- Determine what the patient portion will be for a particular service.
- Display a complete summary of benefits.
Submitting Referrals/Authorizations

In the course of caring for your patients, you may need to refer them to Kaiser Permanente Colorado. In Affiliate Link, you can quickly enter referral information for your patients. The referrals are then transmitted electronically to Kaiser Permanente Colorado.

When creating a referral, you might be required to enter information such as the referring and referred to providers, procedures to be performed, or diagnoses associated with the referral. You can also enter notes to communicate other information about the referral.

Create a new referral

1. After opening your patient’s chart, select Referrals/Authorizations > Create.
2. Enter in the relevant information on both the General tab and the Diagnoses/Procedures tab.
3. In the Notes section, you can attach one document. If you need to submit more files, you can either create one single attachment and attach it now, or add them individually once you’ve created the referral.
4. Click Request Referral to submit your referral.

View a list of existing referrals for a patient

1. Select the Clinicals tab and click Referrals/Authorizations > Referral by Member.
2. The patient’s active referrals appear, including any that are New, Open, Authorized, or Pending Review. To see all referrals, select Show All Referrals in the View Option field.
3. For more information about a referral, click the referral ID link to view a report.
4. You can view this same referral information in the Referrals tab in Chart Review.
Add more notes or attachments to an existing referral

1. Using the method described above, open an existing referral for your patient.

2. Click the Add Note/Attachment button.

3. Add a new referral note, note type and note summary.

4. You could also attach another file. If you wish to add multiple files, you will need to repeat this workflow for each attachment.

5. Click Add Note. Your note/attachment is now included in this referral.
Send a referral message

1. Using the method described above, open an existing referral for your patient.
2. Click the **Referral Message** button.
3. Enter a recipient in the To field. If you wish to send this message to a group of users (also known as a *pool*), preface the pool’s name with the letter “P”
4. Click **Send Message**.

You can also send a referral message directly from this In Basket activity.

1. Open up your In Basket.
2. Click the small arrow next to New Msg [need pic] and select Referral Message.
3. Enter a recipient in the To field
4. Select a patient and the appropriate referral.
5. Add a note.
6. Click **Send Message**.
7. If you receive a response, this will display in the Referral Message folder in your In Basket. For more help with In Basket, consult the guide called 5. Event Monitor and In Basket Messaging.
Receive Event Monitor Notifications for Referrals

You can receive In Basket messages when relevant referrals are authorized or denied for patients that you care for, or when appointments created for those referrals are scheduled, cancelled, or the patient is a no-show.

1. In the upper right, click **Utils**.
2. Click **Event Settings** to manage your Event Monitor notifications.
3. Verify that each of the 5 Referral Notification events you are interested in is checked.
4. Under **Relationship Filtering**, make sure that you either have “Only events associated with a provider, department, or vendor in my group (recommended)” or “Only events associated with certain providers, departments, or vendors” selected. This ensures that you only receive notification when a patient is referred to/from your group. If you have “All events for patients in my group” selected, you will receive notification for any referral created for your patients, even if it’s not related to your group.
5. Click **Accept** to save your changes.
6. When new referral events occur, you will find the messages in the “Referral Notifications” In Basket folder.