Step-by-step uploading a specialty note visit to Connect.

Note: You must upload to Connect ALL visits notes following a specialty appointment for AltaMed's PCP review.

There are two scenarios when your office must upload specialty visit notes to Connect:

1. Following a specialty appointment visit for which no follow-up visit is submitted for approval.
2. Following a specialty appointment visit for which a follow-up visit is submitted for approval.

To upload a document to Connect when a follow-up visit is <u>NOT</u> needed.

There are a variety of ways in which to locate a member:

- Referral number
- Member id
- Member name
- Req provider name
- Tax id
- Req provider NPI

1. Once you have located the member and desired referral click on "Upload".

2. From the "Attachment Type", prompt click on "Select One".

3. From the "Select One" drop-down menu choose "Specialist Notes For PCP".

4. Verify that the specialty visit notes you are uploading to the authorization are the correct files. Enter the Date of Service (DOS) for the visit note in a MM/DD/YYYY format. If you enter the incorrect format the system will prompt you to enter the correct format. Enter the correct format then click on "Continue".

Attachment Type

Specialist notes for the PCP

Date of Service

05202021

Date of Service must be in MM/DD/YYYY format.

CANCEL   CONTINUE

5. The visit notes are now attached to the referral.

Files   FAX COVER PAGE

SPECNOTES
Test Patient.docx
06/18/2021 9:25 AM
REMOVE

UPLOAD

Index "A"

*If you make a mistake, i.e. uploaded the incorrect patient visit note(s) to e referral. Click on "Remove".

Files   FAX COVER PAGE

SPECNOTES
Test Patient.docx
06/18/2021 9:25 AM
REMOVE

UPLOAD

Click on "Yes". to remove the incorrect files.

Removing File

Are you sure you would like to delete Test Patient.docx?

No   Yes

*If more than one document needs to be added to a referral repeat steps 1-5.

To upload a document to Connect when a follow-up visit <u>IS</u> needed.

From the "Documents" Tab click on "Upload"

Repeat steps 1-5.

If you make a mistake see index "A"

If more than one document needs to be added to a referral, repeats steps 1-5.