



Job Aid: Update a Referral

A referring provider can change or modify an existing referral to a service provider as long as the referral is active and available. Please note that only the Primary Care Clinician (PCC) who originated the referral can update it.

This job aid describes how to

- use the **Search for Provider** function to locate referrals to a service provider; and
- modify a previously submitted referral.

Inquire Referral

From the **POSC** home page:

1. Click **Manage Service Authorizations**.

The screenshot shows the 'Health and Human Services' website header with the 'Mass.gov' logo. A navigation bar includes links for HOME, CONSUMERS, PROVIDERS, RESEARCHERS, and GOVERNMENT. Below this, a sidebar on the left lists various services, with 'Manage Service Authorizations' highlighted by a red arrow. The main content area displays the 'Subordinates Search' form, which includes a dropdown menu for 'Provider', input fields for 'First Name' and 'Last Name', and buttons for 'Clear', 'Search', 'New Subordinate', and 'Link Subordinate'. The footer contains copyright information and links for Accessibility, Feedback, Site Policies, Contact Us, Help, and Site Map.

2. Click **Referrals**.

The screenshot shows the Mass.gov Health and Human Services portal. The top navigation bar includes the date "March 26, 2025" and tabs for "HOME", "CONSUMERS", "PROVIDERS", "RESEARCHERS", and "GOVERNMENT". A "Logout" link is in the top right. Below the navigation bar, there are links for "Collapse Services", "Mass.Gov Home", "State Agencies", and "State Online Services". The left sidebar contains a "Provider Services" menu with several options. A red arrow points to the "Referrals" option, which is expanded to show "Enter New Referral" and "Inquire Referral". The main content area is titled "Manage Subordinate Accounts" and contains a "Subordinates Search" form. The form includes a "Provider*" dropdown, "First Name" and "Last Name" text boxes, a "Clear" button, and a "Search" button. At the bottom of the form are "New Subordinate" and "Link Subordinate" buttons. The footer contains copyright information for the Commonwealth of Massachusetts and links for "Accessibility", "Feedback", "Site Policies", "Contact Us", "Help", and "Site Map".

Health and Human Services **Mass.gov**

March 26, 2025 HOME CONSUMERS PROVIDERS RESEARCHERS GOVERNMENT Logout

« Collapse Services ▶ Mass.Gov Home ▶ State Agencies ▶ State Online Services

Provider Services

- > Home
- > Provider Search
- > Manage Batch Files
- > Manage Service Authorizations
 - > Pre-Admission Screening
 - > Prior Authorization
 - > **Referrals**
 - > Enter New Referral
 - > Inquire Referral
 - > Request Transportation
- > Manage Correspondence and Reporting
- > Manage Members
- > Manage Claims and Payments
- > Manage Provider Information
- > Administer Account
- > Reference Publications
- > News & Updates
- > Related Links

Manage Subordinate Accounts

Subordinates Search

Select from the Provider dropdown to manage subordinates.

Provider*

First Name Last Name

Clear Search

New Subordinate Link Subordinate

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3. Click **Inquire Referral**. The **Referral Search** panel will display.

Search for Referral

On the **Referral Search** panel, the Referring Provider can search for referrals they submitted to a Service Provider. You can search by the Referral Number, Member and Service Provider Information, or by the Member and Service Provider issuing the referral.

The screenshot shows the 'Health and Human Services' portal with the 'Referral Search' section active. The left sidebar contains a navigation menu with options like 'Home', 'Provider Search', 'Manage Batch Files', 'Manage Service Authorizations', 'Referrals', 'Request Transportation', 'Manage Correspondence and Reporting', 'Manage Members', 'Manage Claims and Payments', 'Manage Provider Information', 'Administer Account', 'Reference Publications', 'News & Updates', and 'Related Links'. The 'Referrals' section is expanded, showing 'Enter New Referral' and 'Inquire Referral'. The 'Inquire Referral' section has a 'Referral Search' title and a description: 'You can enter the Referral Authorization number to inquire about a specific 278 request.' It features three search methods separated by 'OR' labels. The first method allows searching by 'Referral Authorization #'. The second method allows searching by 'Member ID', 'Service Provider' (a dropdown menu), 'Referring Provider' (a text field with a search icon), 'Effective Date' (a date picker), and 'End Date' (a date picker). The third method allows searching by 'Member ID', 'Referring Provider' (a dropdown menu), 'Service Provider' (a text field with a search icon), 'Effective Date' (a date picker), 'End Date' (a date picker), 'Submission Date From' (a date picker), and 'Submission Date To' (a date picker). There are 'Clear' and 'Search' buttons at the bottom of the search section. The footer contains copyright information for the Commonwealth of Massachusetts and links for Accessibility, Feedback, Site Policies, Contact Us, Help, and Site Map.

Health and Human Services **Mass.gov**

March 26, 2025 HOME CONSUMERS PROVIDERS RESEARCHERS GOVERNMENT Logout

« Collapse Services » [Mass.Gov Home](#) [State Agencies](#) [State Online Services](#)

Provider Services [Inquire Referral](#) ?

Referral Search

You can enter the Referral Authorization number to inquire about a specific 278 request.

Referral Authorization #

OR

Enter the following fields to search the referrals submitted to you.

Member ID

Service Provider

Referring Provider

Effective Date End Date

OR

Enter the following fields to search the referrals submitted by you to another provider.

Member ID

Referring Provider

Service Provider

Effective Date End Date

Submission Date From Submission Date To

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4. To search by referral number:

- Enter the referral number in the **Referral Authorization Number** field.
- Click **Search**.
- Skip to Step 8.

5. If you don't have the referral and want to find the referrals submitted by you (the Referring Provider):
 - Enter the Member ID.
 - Select the **Referring Provider** from the dropdown list. This is determined by your login to the POSC.
 - In the **Service Provider** field, click the **Field Search** button to display the **Search for Provider** panel, where you can perform a search for the service provider. Enter as much information in the search criteria as possible.
 - Click **Search**. A list of servicing providers will appear (there could be multiple pages).
 - Click the **Name** of the desired **Service Provider**.

Complete Referral Search / Select Desired Referral

6. On the **Referral Search** panel for referrals submitted by you (the Referring Provider):
 - Enter the date prior or equal to the **Effective Date** of the referral.
 - Enter an **End Date** the same as or after the end date for the referral.
 - Click **Search**. The **Referral Search Results** panel will display.
7. Click the **Referral Number** link of the desired referral. The **Referral Information** panel will display.

Update Referral

On the **Referral Information** panel:

8. Review the **Referral Information** to ensure you have selected the correct referral. When you have confirmed that you have the correct referral, you can complete the following steps.
9. Modify the number of **Visits** allowed for the referral.
 - The number of **Visits** can be reduced to a number equal to or greater than the number of **Visits** already processed. For example, if there were ten visits and six were used, the number of **Visits** could not be lower than six.
 - The number of **Visits** can be increased, if requested by the PCC.
10. Enter a new **End Date** for the referral.
 - The **End Date** can be set back to a date of service that is not before the **Service Provider's** most recent date of service (previously paid claims are connected to the referral).
 - The **End Date** can be moved to a future date, if requested by the PCC.
11. Update and add text to the **Reason for Review** and the **Service Description** boxes.

When you have completed the desired changes to the referral:

12. Click **Update**. A **Referral Update Confirmation** panel will display, indicating the update was successful. Automatic notifications are not generated by the system for changes to an existing referral.

Notes

The referral can be updated by the originating PCC under the following conditions.

- The member is currently enrolled in the PCC Plan with the PCC who submitted the referral.
- The **Effective Date** and **End Date** range includes the current date.
- The number of visits has not been exhausted.
- The referral is active and available.

The referral will be automatically canceled under the following conditions.

- For any available referral, when the member leaves the PCC Plan, the **End Date** is changed to the close date.
- When a member changes enrollment to a different PCC, the **End Date** of the referral will
 - remain unchanged if the **End Date** on the referral is less than or equal to **30** days after the close date; or
 - be set to a grace period of **30** days after the close date, if the **End Date** on the referral is greater than **30** days after the close date.