

NM Provider Administrator/Case Manager– Step by Step Instructions DOH DDSD – Office of Systems Improvement

Provider Administrator and Case Managers - The step by step Instructions for New Mexico Provider Administrators and Case Managers of agencies will outline the process on how to accept referrals using the Therap system.

How to Accept Referrals - Only people with designated user privileges with the **Recipient Referral** administrative role will be able to view referrals. In order to view Referrals, the Provider Program Administrator must assign designated user with the **Recipient Referral** administrative role.

1. Click on the **Worklist** link in the Referral section under the To Do tab of your Dashboard.

To Do	Modules	High	Medium	Low
Individual	Referral - Search Worklist			
Health				1

2. In the 'WorkList', click on the Form ID of the referral sent. (When a Linked Provider user receives a Referral, the user's **WorkList** is updated and the Referral is in 'Pending Provider Response' status)

Form ID	Individual Name	Notif Level	Status	Anticipated Admission Date	Recipient Provider	Sent Date	Last Update Date	RP Accept Date	RP Denial Date
REF-MULTI-EAS2L46XKDF6E	Adams, Lily	Medium	Pending Provider Response	08/24/2016	ABLED, Inc.	08/24/2016			

3. After opening the Referral, you can click on the **Show Details** link under the General Information section to view the individual details.

Referral

Form ID: REF-MULTI-EAS2L46XKDF6E
Status: Pending Provider Response
Created By: William Harris, Program Manager on 08/24/2016 04:08 AM
Sent By: William Harris, Program Manager on 08/24/2016 04:08 AM
Time Zone: US/Central
[Update History](#)

General Information

Individual Name: Lily Adams [Show Details](#)

Anticipated Admission Date : 08/24/2016

Notification Level: High Medium Low

Recipient Provider : Therap Demonstration Provider

Oversight Agency : Therap MULTI Demonstration Provider

NOTE: You may also download any attachments under the Referral Packet section from the Attachment column. Click on the attachment name which appears in blue link.

Referral Packet				
CheckList	Attachment	Description	Upload Date	Uploaded By
a. IDF	Supports.doc (26 KB)	N/A	10/19/2016	William Harris, Program Manager
b. Medication History	N/A	N/A	N/A	N/A

- The Linked Provider may accept or deny the Referral, enter their comments and update the form.

Denial Reason

Denial Reason : - Please Select -

Comments

Comment

3000 characters left

Back Cancel
Update Referral Accept Deny

- If the agency chooses to deny the Referral, they will need to select the denial reason from the drop-down list under the Denial Reason section. It will also need to enter the corresponding comments in the 'Comments' box before denying the Referral. Click on the **Deny** button on the lower right side of page. The Referral form is then sent back to the Oversight Agency.
- If accepting the Referral, click on the **Accept** button on the lower right side of the page.

Denial Reason

Denial Reason : - Please Select -

Comments

Comment

3000 characters left

Back Cancel
Update Referral Accept Deny

- Once the Oversight Agency accepts the Referral, the Selected By Oversight worklist count is updated on the Dashboard. When you see it then you will be able to see that the Case Manager has accepted your accepted referral. At this time, you will see your client in the pending admissions area.

To Do	Modules	High	Medium	Low
Individual	 Referral - Search Worklist		1	
Health	Selected By Oversight		1	
	Waiting List		1	
Agency	Acknowledgement List		1	

NOTE: Make sure to enroll the new admitted client into one of the agency programs and sites in order to see him/her in the Therap system.