HOW TO ACCEPT OR DENY INTAKE **REFERRALS - PROVIDER**

Topics discussed in this How-To process

1. Retrieving Intake Referrals

- Worklist
- Referral Search
- 2. Accepting an Intake Referral
- 3. Denying an Intake Referral
- 4. Intake Referral Comment Thread
- 5. Glossary

1) Log in to Therap https://secure.therapservices.net/auth/login To Do 2) Worklist - On your Therap Dashboard Modules High Medium Low Individual Referral - Search Worklist with the To Do tab selected, click either 1 Admin Worklist or the Worklist Count under the Agency Reports **Referral Module section** Individual Home Page Settings 3) Click anywhere in a row to open the Worklist referral form Pending Provider Response Status Anticipated Admission Dat Recipient Provider Sent Date DEMO SC Regional Center Account 1 02/23/2017 Last Update Date RP Accept Date RP Denial Date OS Accept Date OS Denial Date Admission Date Closed Date Discontinued Dat 6 items found, displaying all ▼ Individual Name ♦ Notif Level ♦ Form ID Low Medium Low Hiah High Med Export To Excel To Do 4) Referral Search – To find a specific Modules High Medium Low Individua 💠 Referral - Search referral, click the Search link under the Admin Referral Module of your dashboard Agency Reports Individual Home Page Settings

RETRIEVING INTAKE REFERRALS

			ACCEPTING AN II	NIAKE MEFERRA			
5) Enter and/or select search criteria for the		F	Referral Search				
options provided on the Referral Search		Form ID					
page and click Search		First Name John	Last Name Doe				
		High Medium					
		Low					
		Status Pending Provider Response Accepted By Recipient Provider Denied By Recipient Provider					
		Selected By Oversight	×				
		Cancel	Se	arch			
Note: You may combine search criteria on the	is page. For e.	xample, to search fo	or an individual with the	e last name			
Williams who you have previously rejected	for an intake	referral, enter the la	ast name and select the	status of			
"Denied by Pacinient Provider" Plages see the	and of this d	ocument for a furth	or evelopation of Pofer	al Statusos			
Denieu by Recipient Provider. Pieuse see the	enu oj tins u	ocument jor a jurth	er explanation of <u>kejen</u>	ui stutuses.			
6) Click anywhere in a row to open the							
referral form	Referral Search						
		Status	Pending Provider Response				
		Anticipated Admission Date	,				
		Recipient Provider	DEMO SC Regional Center Account 1				
		Sent Date	02/23/2017				
		RP Accept Date					
		RP Denial Date					
		OS Accept Date					
		OS Denial Date					
		Closed Date					
		Discontinued Date					
	3 items found, displaying all						
		Form ID	✓ Individual Name ♦ Notif Level ♦				
			Low				
			High				
			Medium				
		E	Export To Excel				
			New Search				
To accept this intake referral, follow steps <u>7-14</u> . To deny this intake referral, follow steps <u>15-16</u> . To relay a message							
to Oversight, follow steps <u>17-20</u> .							

ACCEPTING AN INTAKE REFERRAL

ACCELLING AN INTAKE REPERINAL				
7) Enter an Anticipated Admission Date in		General Information		
the General Information section at the		Individual Name:	Show Details	
top of the referral form		Anticipated Admission Date :		
		Notification Level:	High Medium 🖲 Low	
You may make adjustments to this date prior		Recipient Provider :	DEMO SC Regional Center Account 1	
to admitting the individual (Step 11).		Oversight Agency :	Demo South Carolina Oversight	
8) Scroll to the bottom of the form and click	Con	nments		
the Accept button	Comr	nent		
	1			
	About	3000 characters left	-	
Note: According the referral at this stage is no	Back	cancel	update Referral Accept Deny	nc for
this individual. You must now wait for Quartie		on that your agency	will be providing intuke service	:S JUI
this maividual. You must now wait for Oversig	gni to respor	id by Selecting you	i acceptance of the referral. O	ince
Oversight does this, you will see the count next	t to the Seled	cted by Oversight fol	der increase. See screenshot be	elow.
9) On your Therap Dashboard with the To	To Do	Mo	dules High Medium Lo	ow
Do tab selected, click Selected by	Individual	😔 Referral - Search		
Oversight under Referral Module	Admin	Worklist	2	
	Admin	Selected By Oversight	2	

	DENTING AN INTAKE REFERRA							
10) Click anywhere in a row to open the	Selected By Oversight							
referral form	Status Selected By Oversight Recipient Provider DEMO SC Regional Center Account 1 Sent Date 02/23/2017 Last Update Date 02/23/2017 RP Denial Date 02/23/2017 O S Accept Date 02/23/2017 C Sential Date 02/23/2017 Admission Date Closed Date Discontinued Date Discontinued Date							
	2 items found, displaying all							
	Form ID Individual Name Notif Level Anticipated Admission Date							
	Medium 02/24/2017							
11) To confirm your accentance of the intake	Export To Excel							
referral, make any necessary update to the Anticipated Admission Date, then click <i>Admit Individual</i> at the bottom of the form	Comment Source Setting List Admit Individual							
Note: Oversight will receive confirmation of t	the admittance and close the referral. You will then be listed as the							
individual's intake provider and must ackn	nowledge closure of the referral. Closed referrals will show in the							
Acknowledgem	ent List folder. See screenshot below.							
12) On your Therap Dashboard with the To Do tab selected, click <i>Acknowledgement</i> <i>List</i> under Referral Module	To Do Modules High Medium Low Individual Referral - Search Worklist Selected By Oversight 1 Acknowledgement List 1 							
13) Click anywhere in a row to open the	Acknowledgement List							
referral form	Recipient Provider Sett Date 02/23/2017 Last Update Date 02/23/2017 IP Denial Date 00 Sunkid Date Discontinued Date 2 2 Term found, displaying all Admission Date Admission Date Closed Date 0/24/2017 02/23/2017 <l< td=""></l<>							
Note: Alternatively, you may select the Referre	al Search option from your dashboard and filter results by the closed							
status to c	lear this acknowledgement type.							
14) Scroll to the bottom of the form and click the <i>Acknowledge</i> button	Comments							
	Back Cancel Acknowledge							
DENYING AN INTAKE REFERRAL	Daniel Passan							
15) Select a reason for denial from the drop-								
of the referral form	Denial Reason : Please Select - Required							
Note: You may enter additional deta	ails/comments in the Comment box. See screenshot below.							
16) Scroll to the bottom of the form and click	Comments							
the <i>Deny</i> button	Comment							

About 3000 characters left

Back Cancel Update Referral Accept Deny

Intake Referral Comment Threai	C										
17) Enter comments for Oversight, then click		Comm	ents								
Update Referral	Comment										
		I am re	questing ac	ditional info	before accept	ing this re	eferral.				
		About 293	7 characters	eft						4	
		Back	Cancel					Upda	te Referral	Accept [Deny
18) To view Oversight's responses, open the	Modules				High	High Medium Low					
Referral module's Acknowledgement List	4	Ref	erral - s	earch							
on your dashboard		Wo	rklist							1	
		Ack	nowledg	ement List						2	
19) Click anywhere in a row to open the	Acknowledgement List										
referral form					Notif Loval Recipient Provider RP Denial Date OS Denial Date Discontinued Date	Medium DEMO SC Regional Ce	nter Account 1				
	From 10		- Individual		2 iten	ns found, displaying all	I sublicities	DD 4	00.1	• destaulture	Alexad Bate - A
	Form ID		✓ Individual Name	Status Pending Provider Response	Anticipated Admission Date	 Sent Date 03/09/2017 	03/09/2017	RP Accept Date	OS Accept Date	Admission Date	Closed Date
				Closed	03/23/2017	03/08/2017	03/08/2017	03/08/2017	03/08/2017	03/08/2017	03/08/2017
20) To end the thread, click the Acknowledge	1	Comn	ent								
button	1										
	1									<i>h</i>	
		3000 c	haracters left								
			_						_		
							n To Minister	Link Admits 1	and to defend	Acknowledge	
	L	Back	Cancel		Update	Referral Kee	p in waiting	List Admit I	ndividual	Acknowledge	-

Referral. You would then have to go back to the Acknowledgement List and click Acknowledge to clear the entry from this list. The Comment box will disappear from the form when you admit an individual.

GLOSSARY

Referral Statuses

<u>Pending Provider Response</u> – Referrals with this status have either not been accepted/denied by the provider or contain an active comment thread between the provider and Oversight.

<u>Accepted by Recipient Provider</u> – This is the status of a referral when a provider has accepted an individual's referral for intake and proposed an Anticipated Admission Date to Oversight.

<u>Denied by Recipient Provider</u> – This is the status of a referral when a provider has denied an individual's referral for intake and indicated a denial reason on the form.

<u>Selected by Oversight</u> – This is the status of a referral when Oversight is waiting for an intake provider to officially admit an individual after accepting the intake referral.

<u>Denied by Oversight</u> – This is the status of a referral when Oversight has denied an intake provider's acceptance of an intake referral.

<u>Admission Completed</u> – This is the status of a referral when a provider has admitted an individual but the referral has not yet been officially closed by Oversight.

<u>*Closed*</u> – A referral's status will change to *Closed* when Oversight has closed the referral on their end after the provider has admitted an individual for intake.

<u>Discontinued</u> – Oversight may update a referral to reflect this status when an intake referral is no longer needed. If discontinued, a referral will contain comments near the bottom of the form stating the reason for discontinuation.