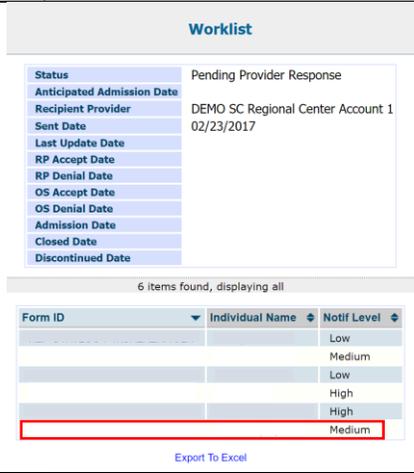# HOW TO ACCEPT OR DENY INTAKE REFERRALS - PROVIDER

Topics discussed in this How-To process

1. Retrieving Intake Referrals
   o Worklist
   o Referral Search
2. Accepting an Intake Referral
3. Denying an Intake Referral
4. Intake Referral Comment Thread
5. Glossary

RETRIEVING INTAKE REFERRALS

|		
1)	Log in to Therap	https://secure.therapservices.net/auth/login
2)	Worklist - On your Therap Dashboard with the To Do tab selected, click either *Worklist* or the *Worklist Count* under the Referral Module section	
3)	Click anywhere in a row to open the referral form	
4)	Referral Search – To find a specific referral, click the *Search* link under the Referral Module of your dashboard	

5) Enter and/or select search criteria for the options provided on the Referral Search page and click *Search*	
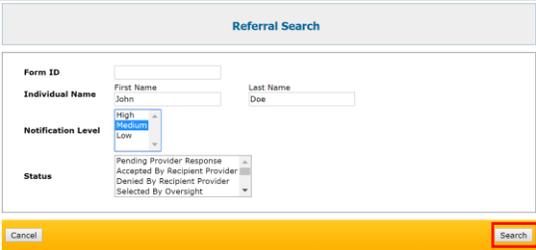
Note: You may combine search criteria on this page. For example, to search for an individual with the last name Williams who you have previously rejected for an intake referral, enter the last name and select the status of "Denied by Recipient Provider." Please see the end of this document for a further explanation of Referral Statuses.
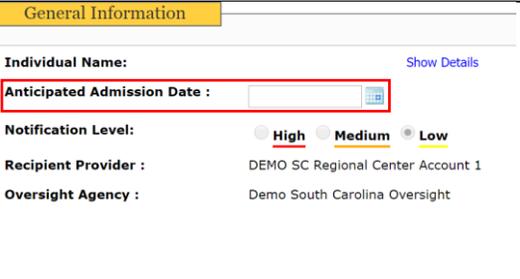
6) Click anywhere in a row to open the referral form	
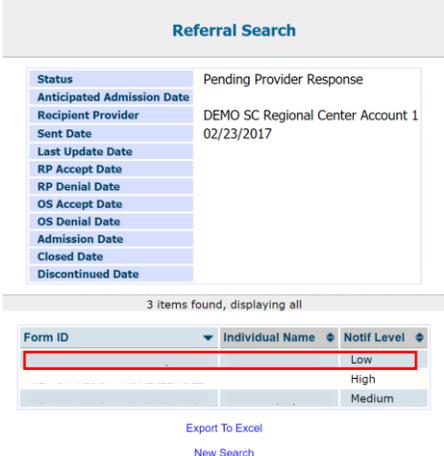
To accept this intake referral, follow steps 7-14. To deny this intake referral, follow steps 15-16. To relay a message to Oversight, follow steps 17-20.

ACCEPTING AN INTAKE REFERRAL

7) Enter an *Anticipated Admission Date* in the General Information section at the top of the referral form *You may make adjustments to this date prior to admitting the individual (Step 11).*	
8) Scroll to the bottom of the form and click the *Accept* button	
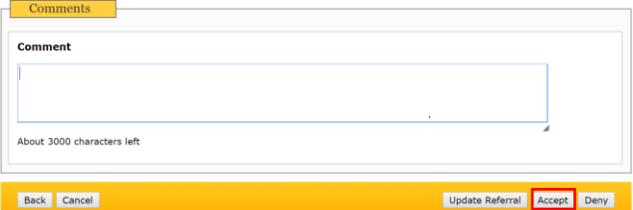
Note: Accepting the referral at this stage is not confirmation that your agency will be providing intake services for this individual. You must now wait for Oversight to respond by "Selecting" your acceptance of the referral. Once Oversight does this, you will see the count next to the Selected by Oversight folder increase. See screenshot below.

9) On your Therap Dashboard with the To Do tab selected, click *Selected by Oversight* under Referral Module	

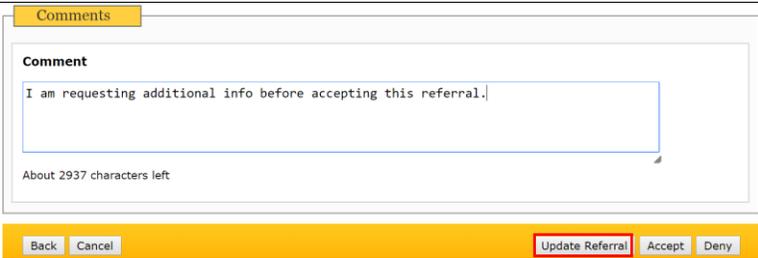|	
10) Click anywhere in a row to open the referral form	**Selected By Oversight** Status: Selected By Oversight Recipient Provider: DEMO SC Regional Center Account 1 Sent Date: 02/23/2017 Last Update Date: 02/23/2017 RP Accept Date: 02/23/2017 RP Denial Date: OS Accept Date: 02/23/2017 OS Denial Date: Admission Date: Closed Date: Discontinued Date: 2 items found, displaying all Form ID ▼ | Individual Name ◆ | Notif Level ◆ | Anticipated Admission Date ◆ Low Medium | 02/24/2017 Export To Excel
11) To confirm your acceptance of the intake referral, make any necessary update to the Anticipated Admission Date, then click *Admit Individual* at the bottom of the form	**Comments** Comment 3000 characters left Back | Cancel | Update Referral | Keep In Waiting List | **Admit Individual**
Note: *Oversight will receive confirmation of the admittance and close the referral. You will then be listed as the individual's intake provider and must acknowledge closure of the referral. Closed referrals will show in the Acknowledgement List folder. See screenshot below.*	
12) On your Therap Dashboard with the To Do tab selected, click *Acknowledgement List* under Referral Module	**To Do** | **Modules** | High Medium Low **Individual** | ✥ **Referral - Search** **Admin** | Worklist | 2 | Selected By Oversight | 1 **Agency Reports** | Acknowledgement List | 1
13) Click anywhere in a row to open the referral form	**Acknowledgement List** Recipient Provider: DEMO SC Regional Center Account 1 Sent Date: 02/23/2017 Last Update Date: 02/23/2017 RP Denial Date: OS Denial Date: Discontinued Date: 2 items found, displaying all Form ID ▼ | Individual Name ◆ | Notif Level ◆ | Status ◆ | Anticipated Admission Date ◆ | RP Accept Date ◆ | OS Accept Date ◆ | Admission Date ◆ | Closed Date ◆ Medium | Pending Provider Response Low | Closed | 02/24/2017 | 02/23/2017 | 02/23/2017 | 02/23/2017 | 02/23/2017
Note: *Alternatively, you may select the Referral Search option from your dashboard and filter results by the closed status to clear this acknowledgement type.*	
14) Scroll to the bottom of the form and click the *Acknowledge* button	**Comments** Back | Cancel | **Acknowledge**

DENYING AN INTAKE REFERRAL

15) Select a reason for denial from the drop-down menu in the Denial Reason section of the referral form	**Denial Reason** Denial Reason : - Please Select - ▼ **Required**
Note: *You may enter additional details/comments in the Comment box. See screenshot below.*	
16) Scroll to the bottom of the form and click the *Deny* button	**Comments** Comment About 3000 characters left Back | Cancel | Update Referral | Accept | **Deny**

INTAKE REFERRAL COMMENT THREAD

17) Enter comments for Oversight, then click *Update Referral*	**Comments** **Comment** I am requesting additional info before accepting this referral. About 2937 characters left Back Cancel Update Referral Accept Deny

18) To view Oversight's responses, open the Referral module's Acknowledgement List on your dashboard	**Modules** **High** **Medium** **Low**
	
	 Referral - Search
	    Worklist 1
	    Acknowledgement List 2

19) Click anywhere in a row to open the referral form	**Acknowledgement List** Notif Level Medium Recipient Provider DEMO SC Regional Center Account 1 RP Denial Date OS Denial Date Discontinued Date 2 items found, displaying all Form ID / Individual Name / Status / Anticipated Admission Date / Sent Date / Last Update Date / RP Accept Date / OS Accept Date / Admission Date / Closed Date Pending Provider Response 03/09/2017 03/09/2017 Closed 03/23/2017 03/08/2017 03/08/2017 03/08/2017 03/08/2017 03/08/2017
20) To end the thread, click the *Acknowledge* button	**Comment** 3000 characters left Back Cancel Update Referral Keep In Waiting List Admit Individual Acknowledge
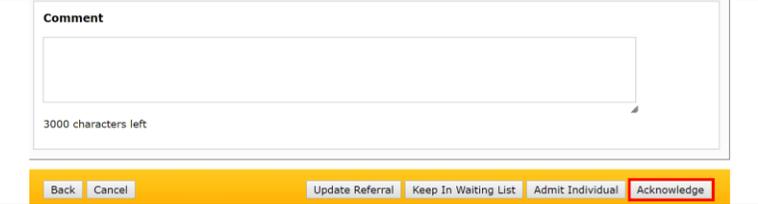
Note: *In the example shown above, you may choose to enter a comment then click Admit Individual or Update Referral. You would then have to go back to the Acknowledgement List and click Acknowledge to clear the entry from this list. The Comment box will disappear from the form when you admit an individual.*

GLOSSARY

Referral Statuses

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

Accepted by Recipient Provider – 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.

Denied by Recipient Provider – 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.

Selected by Oversight – 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.

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

Admission Completed – 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.

Closed – 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.

Discontinued – 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.