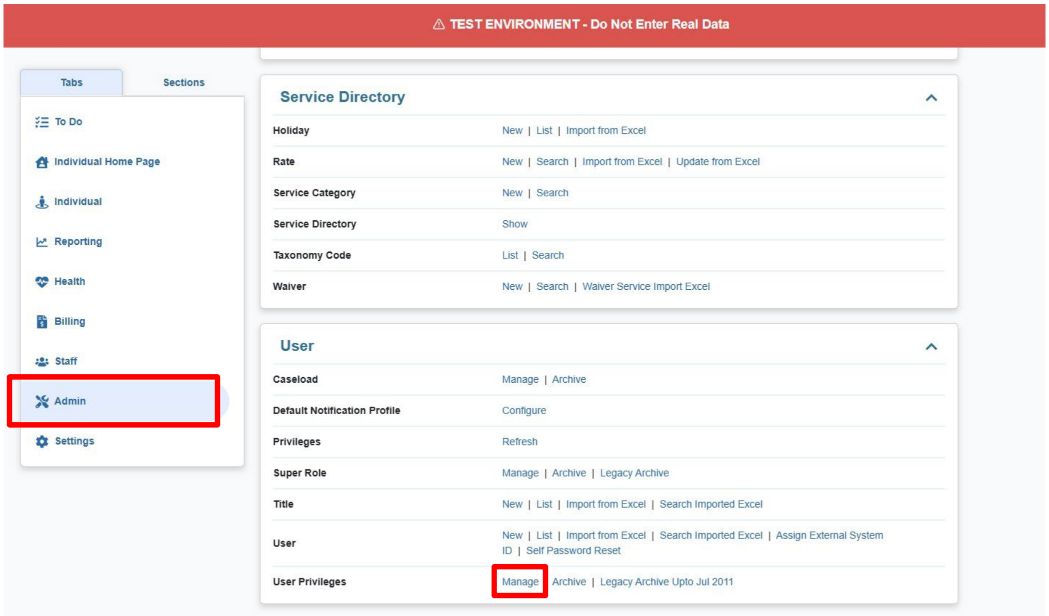
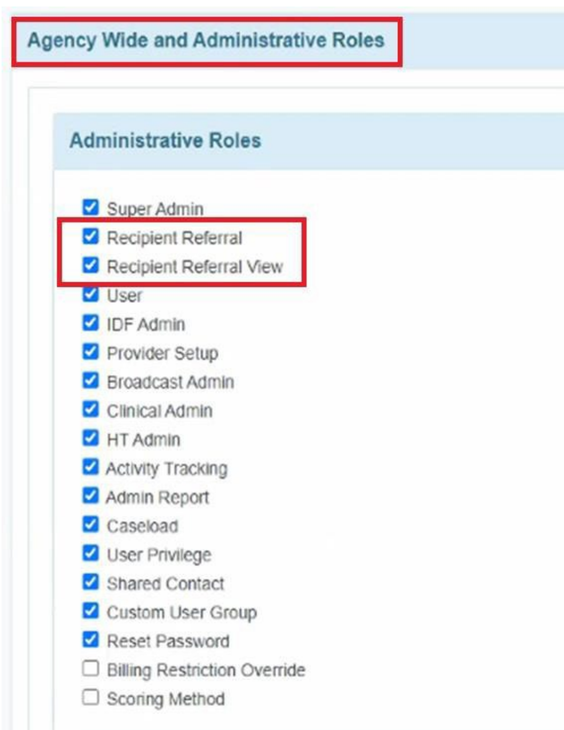
Therap Referral Module

Adapted from [Referral for Oversight Providers]

Activating Access to the Oversight Referral Module

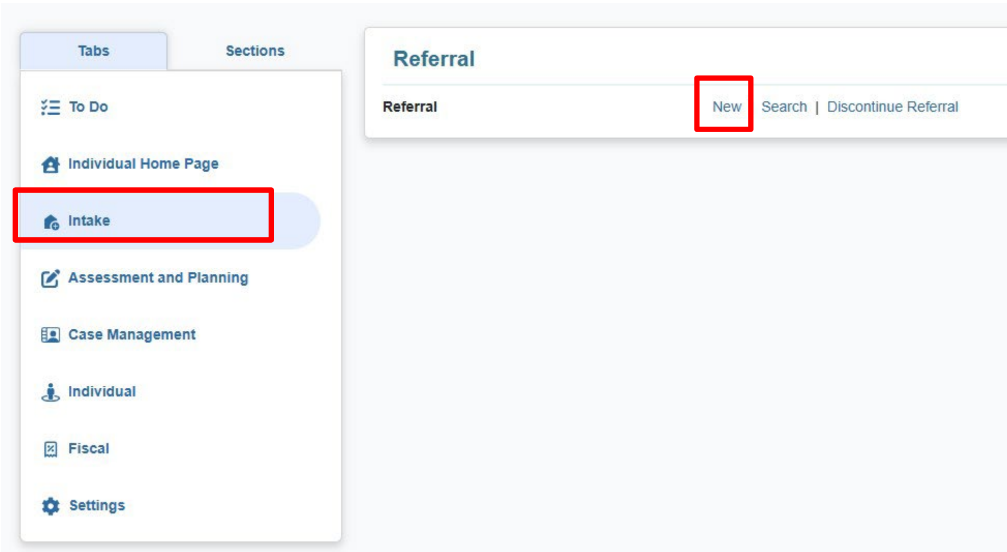
Providers must have the Oversight Referral feature enabled in their Shareable Super Role. Go into the Provider's Administrative account and Manage User Privileges to activate the Referral Module.



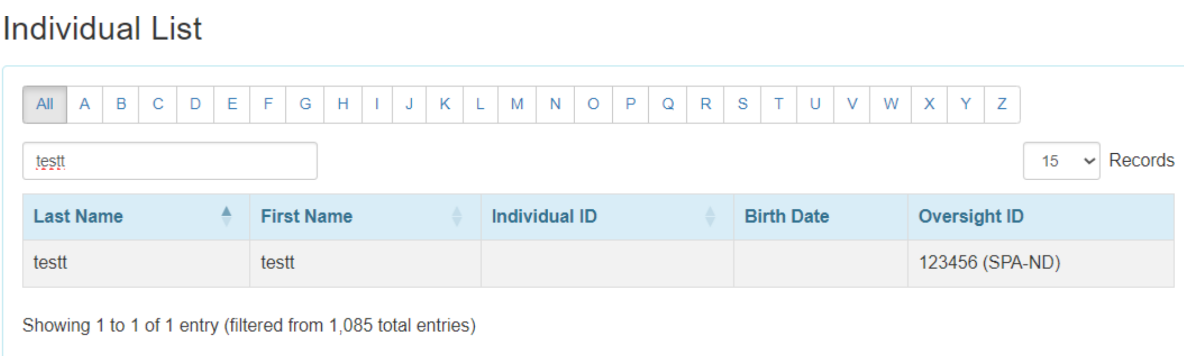


Creating Referrals – Care Coordinators This is for members that you are sending a referral to an agency that they are already not receiving services from. Care coordinators will be able to create referrals for supportive services – i.e. peer support, housing support, non-medical transportation, etc. They will also transfer care coordination services this way as well.

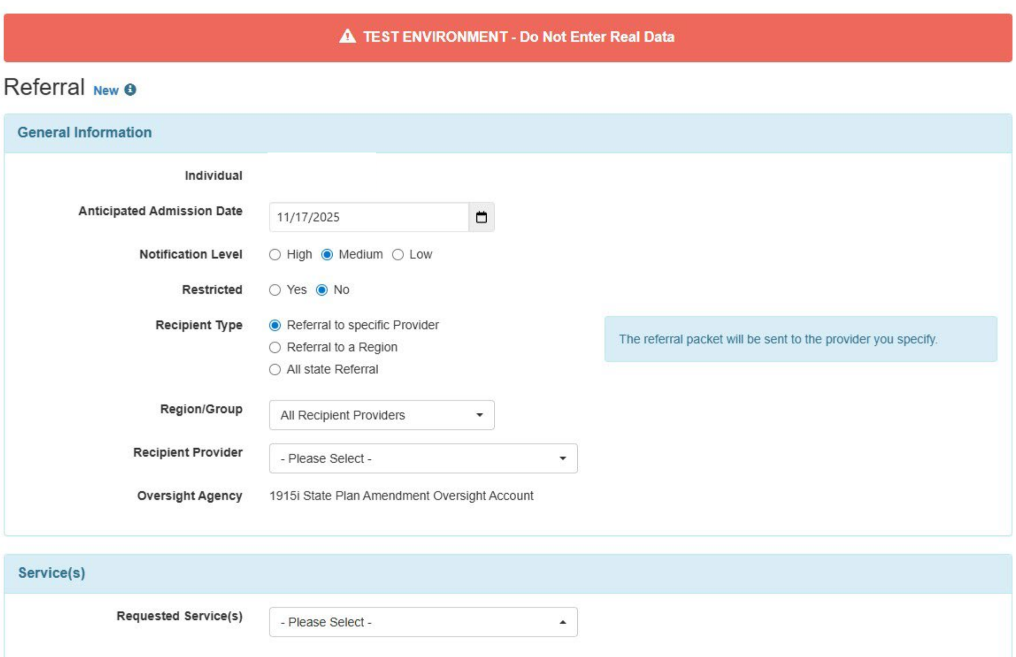
Go to Intake in the state Oversight account and click New in the Referral line.



Select the member from the list



Enter the following information:



Anticipated Admission Date: Allow the provider two business days to accept/deny the referral per current 1915(i) policy.

Notification Level: Unless the need is emergent, we'd expect to see Medium on referrals.

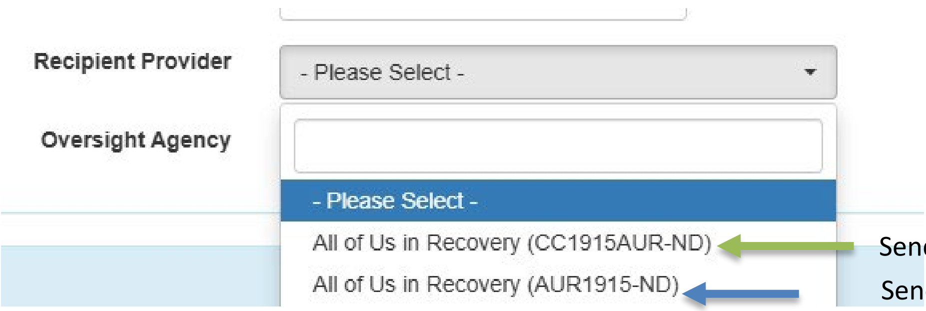
Restricted: Select No

Recipient Type: Referral to Specific Provider

Region/Group: All Recipient Providers

Recipient Provider: Select a provider's Non-Care Coordination Agency (i.e. the one without CC in the name) for supportive services. If you are transferring care coordination you would select the agency name with CC in it.

Recipient Services: Select the services you are sending the referral for.

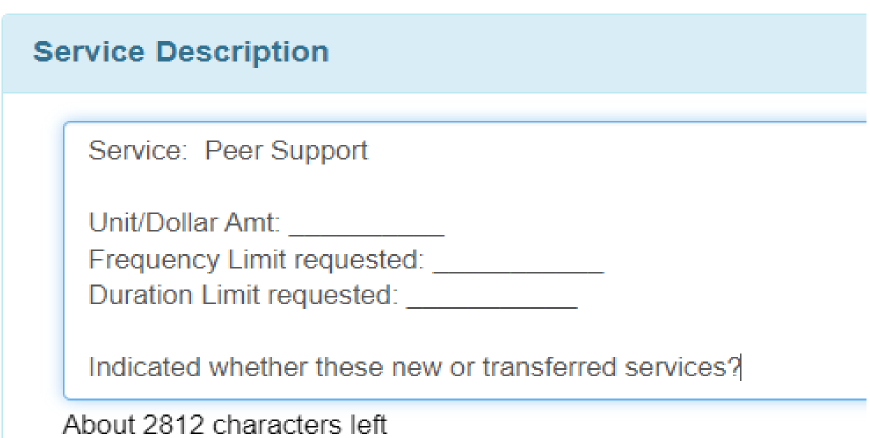


Send to this one for Care Coordination

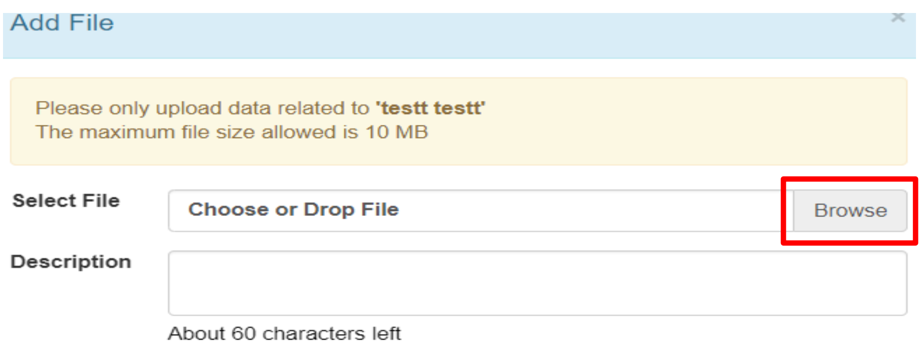
Send to this one for supportive services

In the **Service Description** box, describe in <u>detail</u> what service you are sending the referral for. For example, if it was for peer support you would provide the following information.

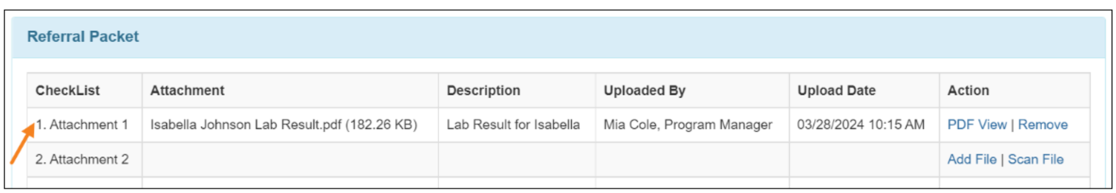
- Service needed, i.e. Peer Support, etc.
- Units Requested
- Frequency Limit Requested
- Duration Limit Requested
- Indicate if these are New or Transferred Services
- This is also where you will put in any cultural, or linguistic, wants/needs the member has



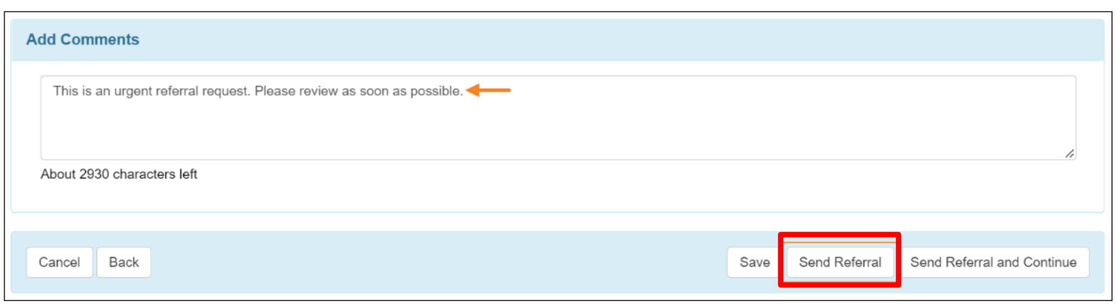
You will attach the member's plan of care, the ROI and any other documents you may want to add in the Referral Packet section by clicking Add File. You will need to upload the .pdf version of the member's plan of care after downloading it from Therap. There is currently no way to attach the POC through Therap. You can select Attach Other File to add things like the member's application, their WHODAS, and/or their Diagnosis information, if you choose to send them. At a minimum you must send a copy of the POC and a signed ROI for the agency you are sending the referral to. If you do not, the referral is not considered complete.



The added file will then appear in the 'Referral Packet' section of the Referral form.



Enter relevant comments in the 'Add Comments' section and then send the form by clicking on the **Send Referral** button.



Comments you may include time-sensitivity issues or anything else you might want to draw to the attention of the other agency.

You can "Save" the Referral to come back to it later; this will create a draft of the referral and it will not send it to the other agency.

Once you click "Send Referral" the referral will be sent to your selected provider. You will see this message.

A confirmation message will be displayed stating that the Referral has been sent to the selected providers.

Your agency contact who handles referrals will monitor their To Do list for Referrals Marked “Accepted by Recipient Provider”. More on that in a later section.

For providers who already provide supportive services to a member

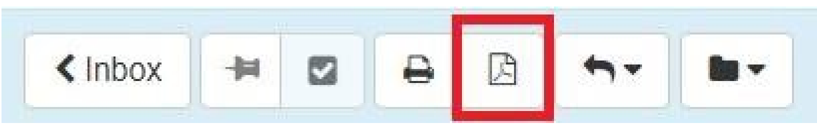
Some members may already be doing other services with a member. For example, the member may be working with the supportive service provider for peer support and wants them to also now do housing support. In this case you will not be able to send a full referral through Therap. The purpose of a Therap referral is to link the provider with the member and if the provider is already serving as the member’s peer support provider, they already will be linked in Therap.

How to handle referrals in these cases

For referrals in this case, they will already have access to the member, their plan of care, etc. so you do not need to send a “Referral Packet.” Instead, you will send a Cross-Provider SComm message in Therap titled “(whatever Supportive Service you are referring for – i.e. Housing) Referral” and then use the body of the message to give the anticipated start date and any other helpful referral details the referred provider needs to decide as to whether they want to accept or deny the referral. The referred provider will reply with an Accept to accept the referral and respond Deny if they are denying the referral, along with a short reason for denial.

The expectation is that referrals done via SComm will also be subject to a 2-business day response time or be deemed a denial. Using SComm in Therap you can see whether a provider has read and acknowledged the message. If it is un-acknowledged after two business days with no response you can determine that is a denial and documentation of that is easy to access in Therap. If you are going to be asking for a conflict-of-interest exemption, you will need to save a PDF of the Denied referral’s Scomm and attach it to the POC.

You can easily download a SComm message and attach this to a POC as documentation of being the only willing and qualified provider to serve a member as both care coordinator and supportive service provider.



Viewing and Accepting/Denying Referrals – Agency Administrators in charge of referrals at the agency accepting the referral.

Log in to Therap to accept referrals as the admin of the supportive service provider, or the admin of care coordination for care coordination transfers. **NOTE:** Agencies need to have someone with this access checking for referrals in Therap. You will see Referral items in the "To Do" tab in Therap in the Referral line.

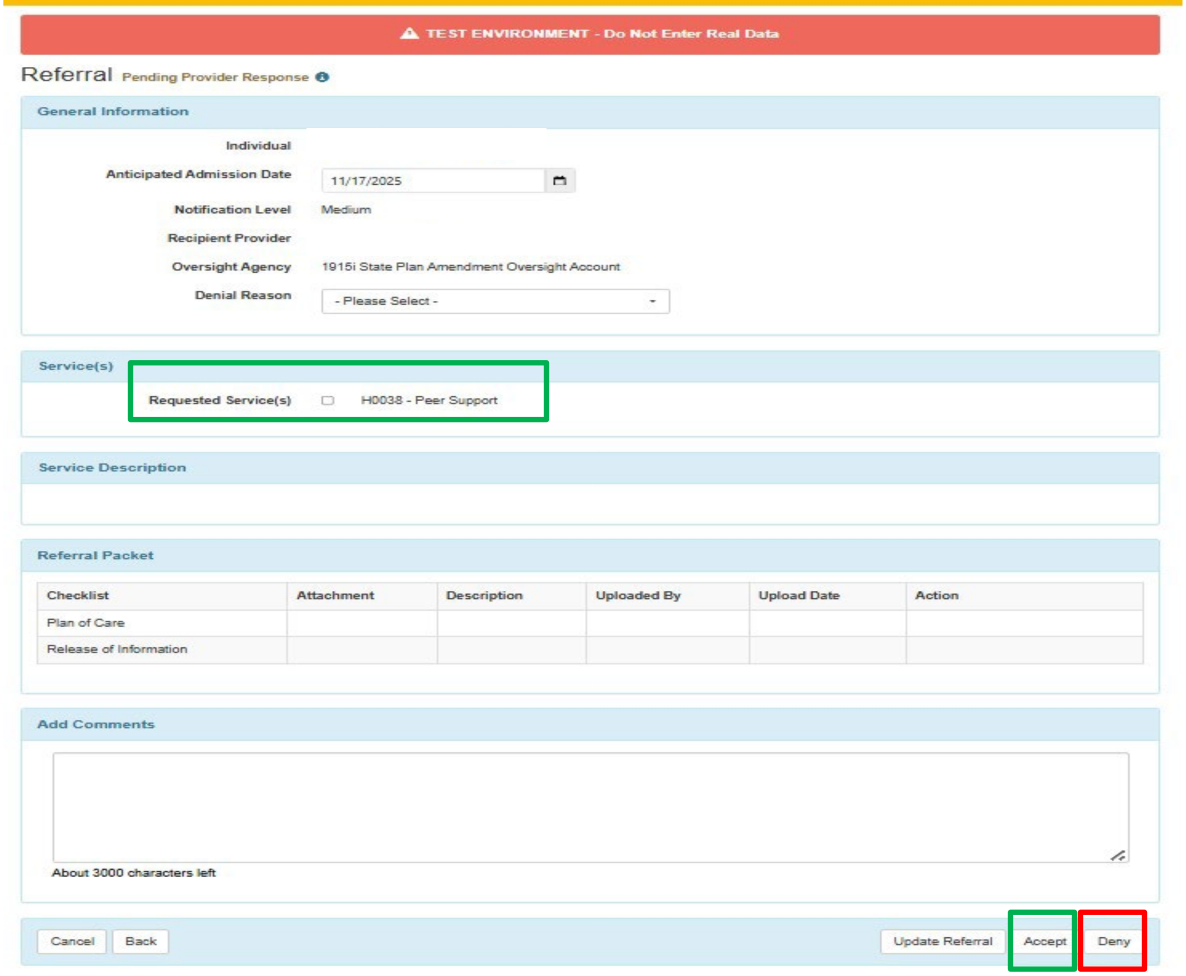
Select referrals sent to your agency marked as Pending Provider Response


Worklist

Filter | 15 Records

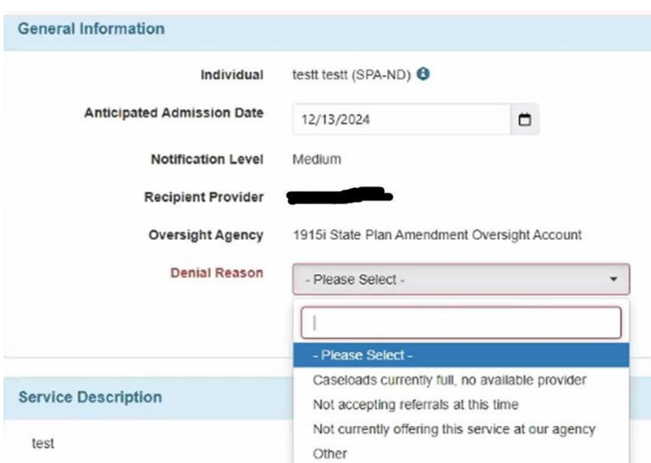
Form ID	Individual Name	Oversight ID	Notif Level	Status	Anticipated Admission Date	Recipient Provider	Sent Date	Last Update Date	RP Accept Date	RP Denial Date	OS Accept Date	OS Denial Date	Admission Date	Closed Date	Discontinued Date	Time Zone
REF-SPAND-[redacted]	Doe, John	[redacted] (SPA-ND)	Medium	Pending Provider Response	12/18/2024	[redacted]	12/11/2024									US/Central

Showing 1 to 1 of 1 entry



You can **Accept** or **Deny** the referral. Make sure to also select the Requested Service you are accepting by checking the box next too it.

For denials, you can choose one of the pre-populated drop-down reasons for denying a referral or select "other" for something different and explain in the comments section to the referring care coordination agency.



If you choose **Update Referral**, you will be able to send comments back to the referring provider such as suggesting a different admission date or giving/getting additional information before accepting or denying.

Select **Deny** to deny the referral. Referring provider will get notice of your denial. You will select your denial reason BEFORE submitting the denial.

If you choose **Accept**, you will see this message for your referral.

The Referral form REF-SPAND-NEC4XEYZJ4QQ7 has been Successfully Accepted

Referrals Accepted by receiving agency are sent back to Oversight Care Coordination Agency (the agency that sent the referral) for approval. These will appear in your To Do tab, labeled "Accepted by Recipient Provider List."

On the 'Accepted By Recipient Provider List' page, the Referrals which have been accepted and sent back to the Oversight Agency will be displayed. Click on the required Referral from the list.

Accepted by Recipient Provider List

Filter

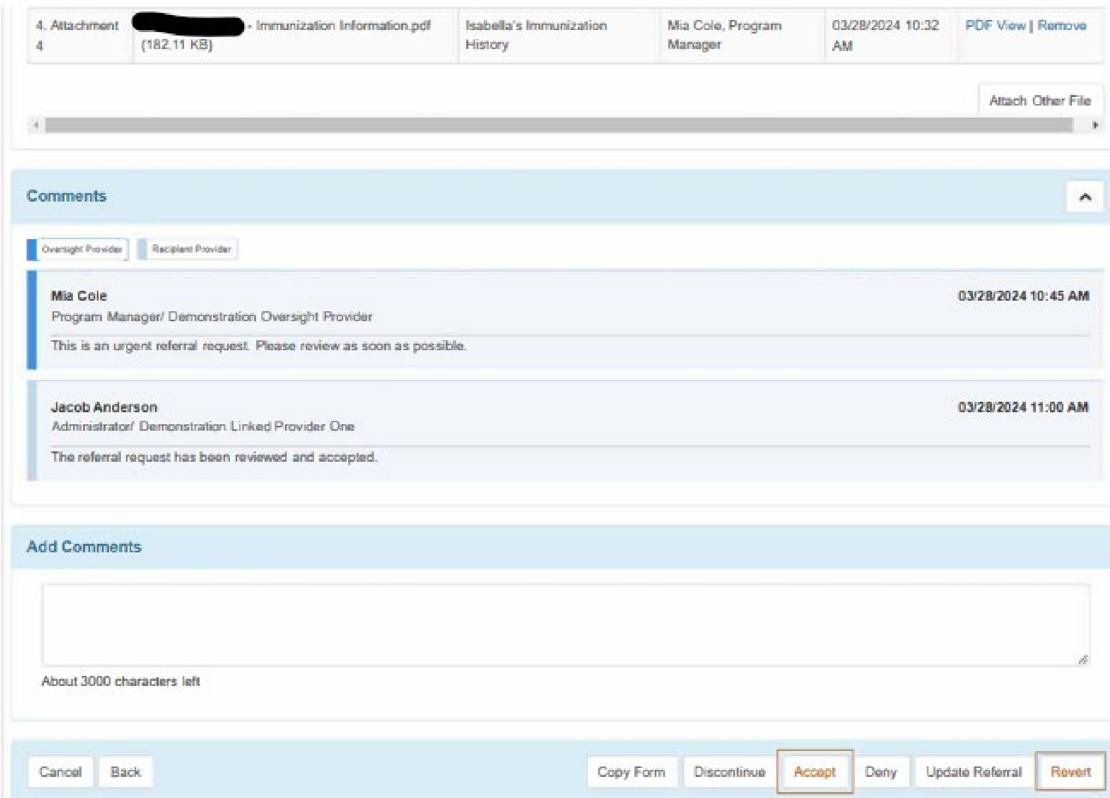
15 Records

Form ID	Individual Name	Oversight ID	Notif Level	Status	Entered By	Anticipated Admission Date	Recipient Provider	Sent Date	Last Update Date	RP Accept Date	RP Denial Date	OS Accept Date	OS Dei Dat
REF-DEMO-N5W3LTASVWVV4		23456789 (DEMO-OS)	Medium	Accepted By Recipient Provider	Cole, Mia / Program Manager	03/31/2024	Demonstration Linked Provider One	03/28/2024	03/28/2024	03/28/2024			

Showing 1 to 1 of 1 entries

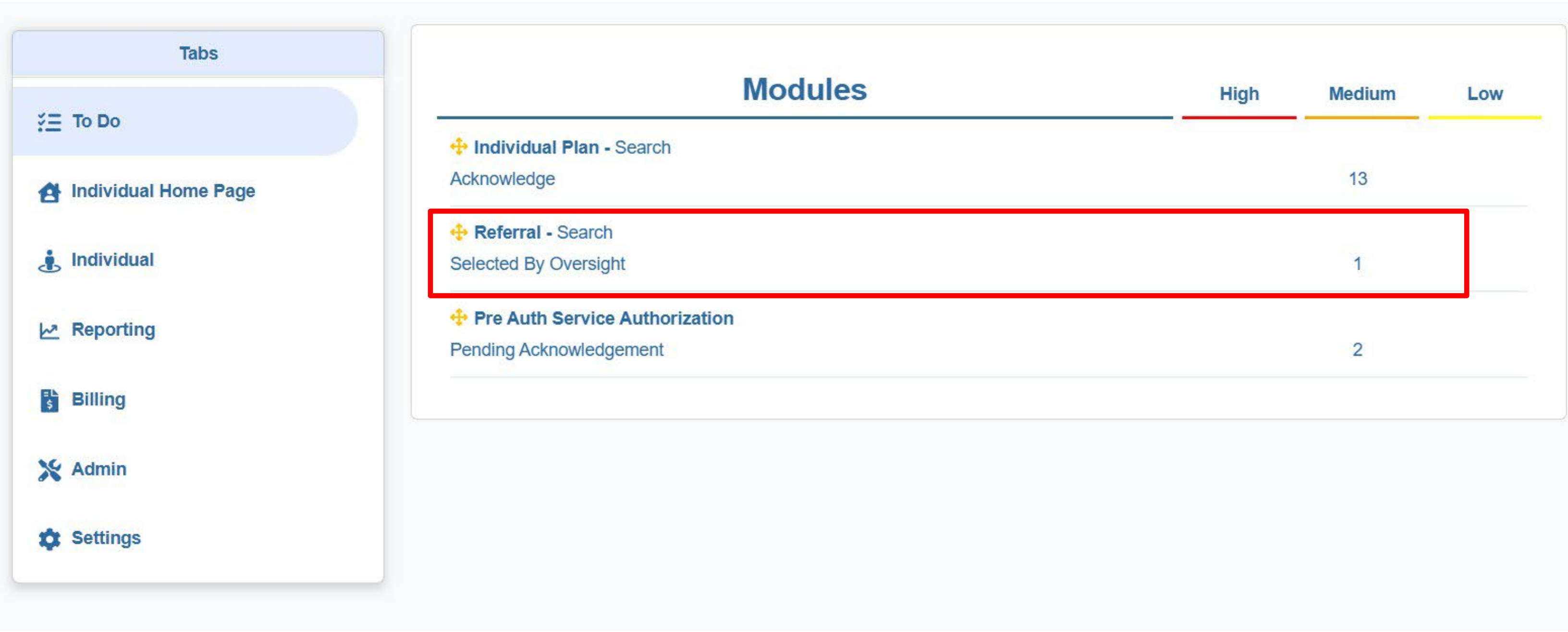
Previous 1 Next

Oversight users may accept, deny, update, or revert the Referral as necessary using the respective buttons at the bottom. Click on the Accept button, to accept the Referral that was accepted by the recipient provider. Clicking on the Revert button will return the Referral form to its previous state. For example, if the status of the Referral form is 'Accepted By Recipient Provider', clicking on the Revert button will return it to 'Pending Provider Response' status. If something comes up at this step, you can also Deny the referral.

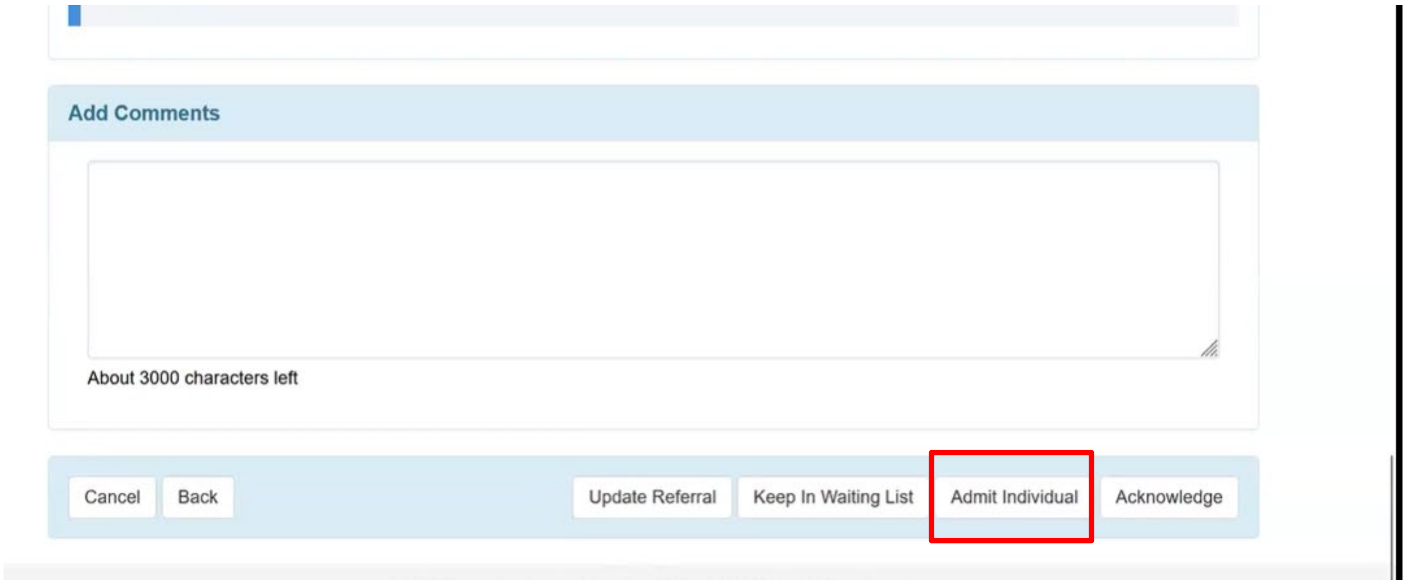


A confirmation message will be shown stating that the individual has been successfully admitted in Pending Approval status

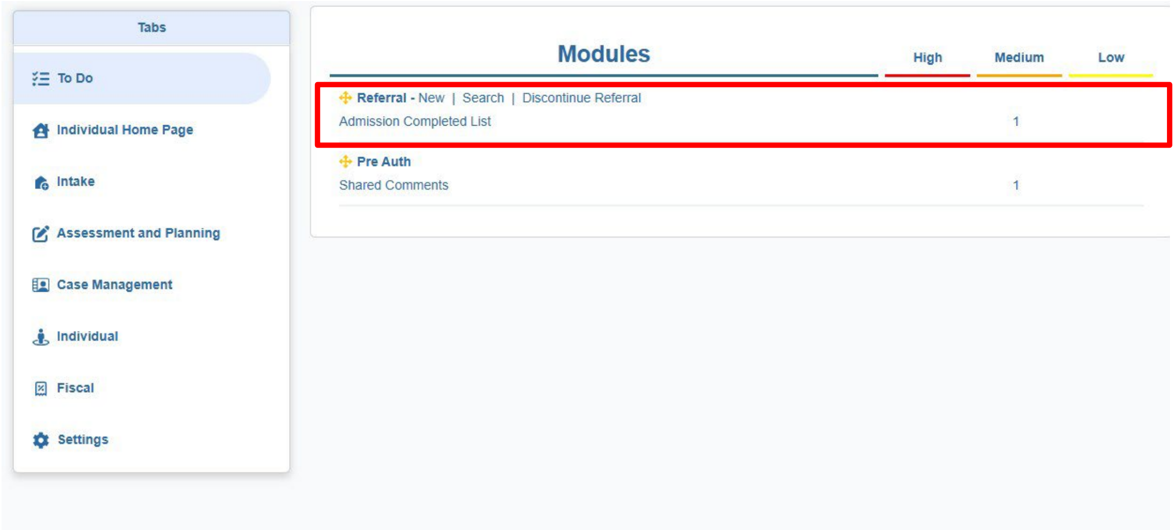
Once the care coordination agency (the agency that sent the referral) has accepted your acceptance of the referral, you (the agency receiving the referral) will need to Admit the individual. To do so, click on “Selected by Oversight” in your To Do tab.



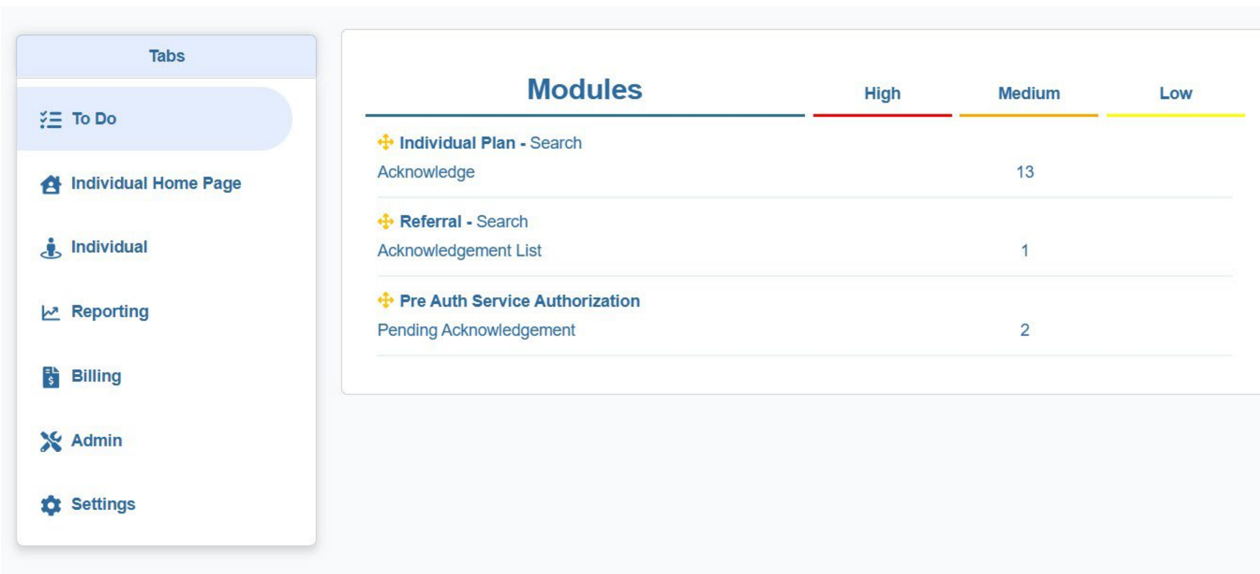
Clicking on Selected by Oversight will bring up a list of all referrals that have been accepted by the other agency’s oversight account. Select the referral that you need to admit. This will bring you to that member’s referral. Scroll down to the bottom of the referral and select Admit Individual.



Now the agency that sent the referral (Care Coordination agency) must go into the Admission Complete List, select the referral, and **close** the referral. The referral process is not done, and the member is not linked to the service (receiving) agency until the referral is Closed.

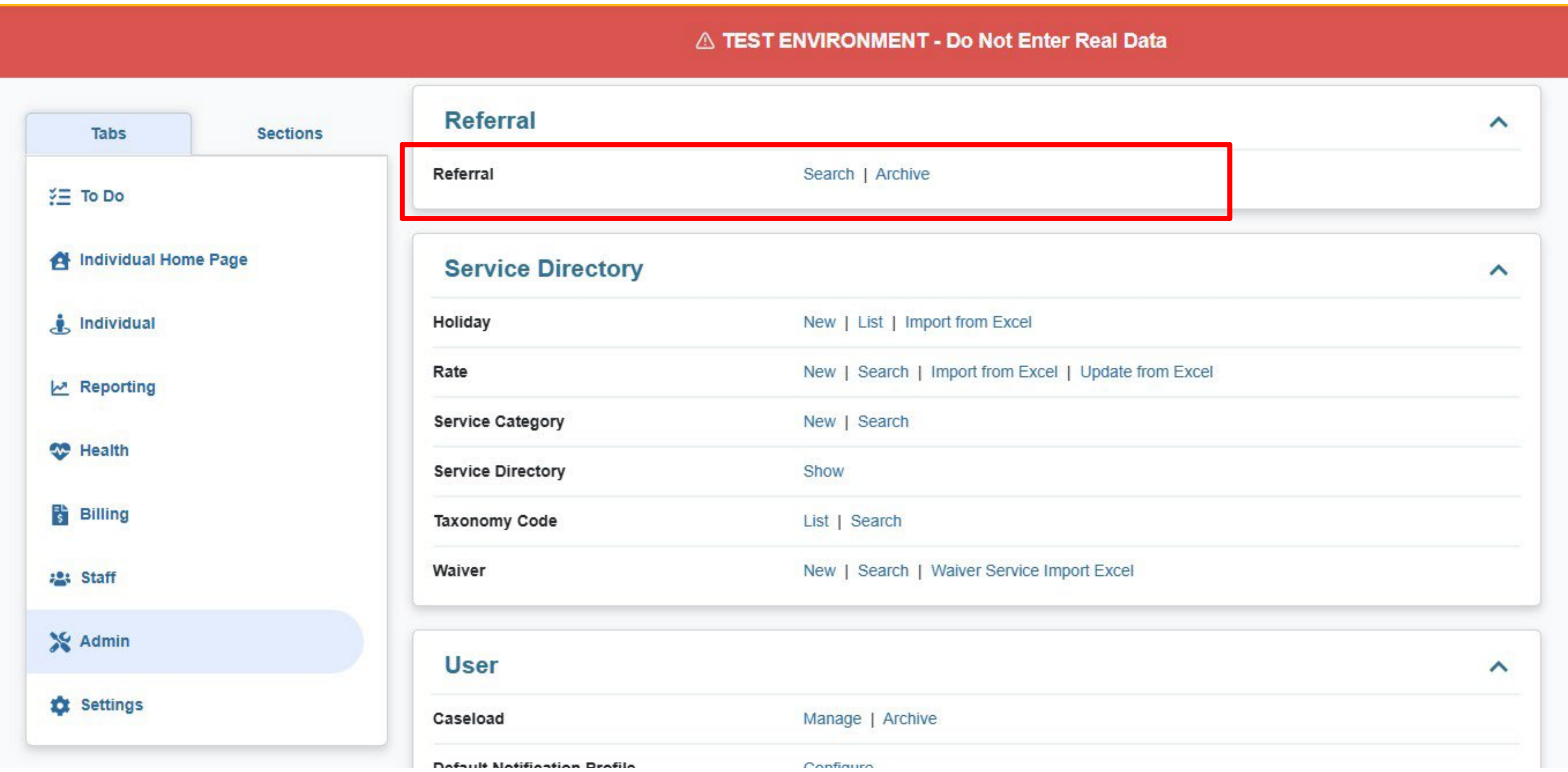


Once the sending agency (care coordination) has Closed the referral, the receiving (service) agency will have it listed under their Acknowledgement list, in the Referral line, in their To Do tab. The status of the referral will be Closed. That tells you that the referral is all done, and the member is now linked to your agency.

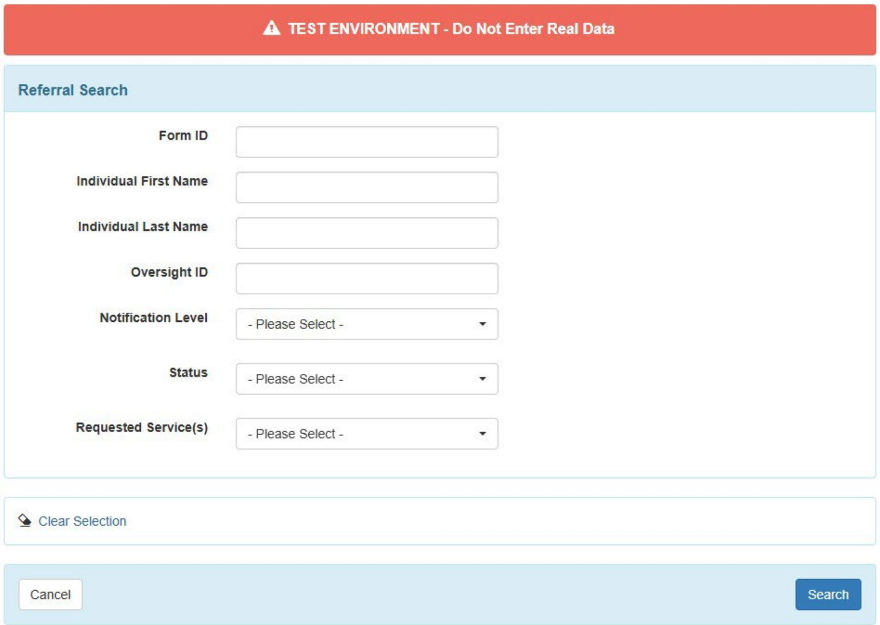


If you are accepting a care coordination transfer from another agency, it is at this point that you will go to the 1915i webpage and fill out a CCRR form. Make sure to check that it is a transfer on the CCRR form.

To search for a referral, click on Admin and then Search in the Referral line



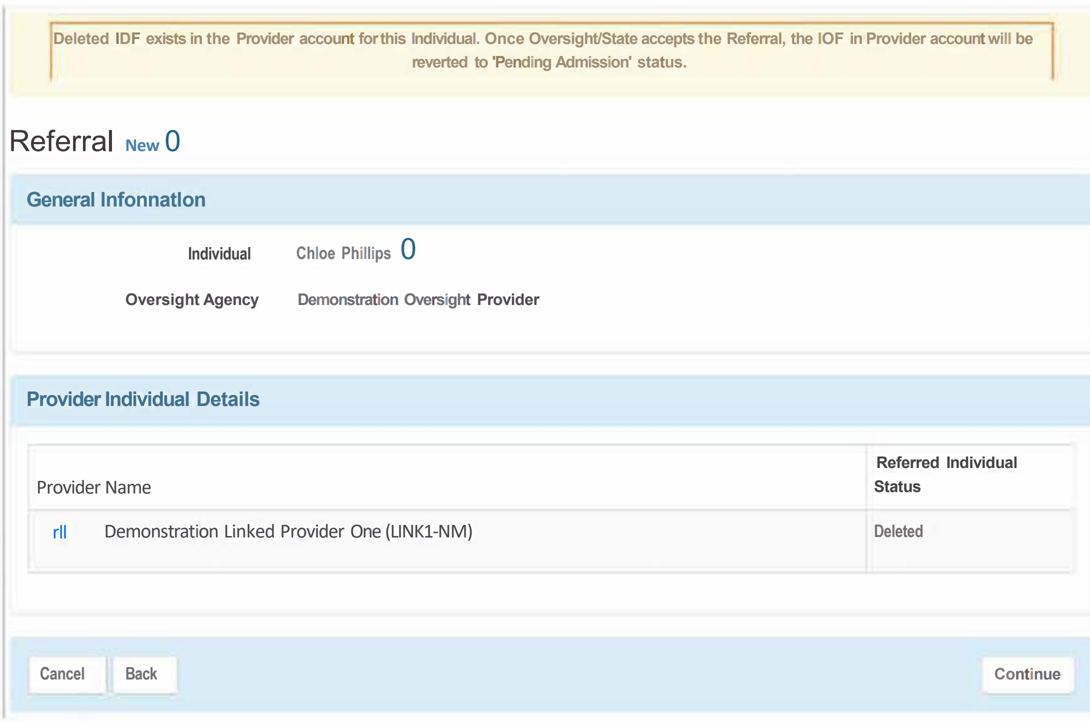
Once you click on search you will be brought to this page. If you want to search for a specific person's referral, enter their name. Or you can click on search, and the next page will bring up all the referrals your agency has.



Discontinuing Referrals

To Discontinue a referral, you would search for the referral. But this time you would look for a referral that does not have the status of Closed. Referring providers may discontinue referrals once 2 full business days (48 business hours) have passed since sending the referral and there is no response from the receiving agency.

If a Referral for an individual is discontinued after having been 'Selected by the Oversight', then the individual's Individual Demographic Form (IDF) in the Linked Provider's account turns to 'Deleted' status. If a new Referral for the same individual is sent to the Linked Provider again, then users will receive a validation message stating that a deleted IDF exists for the individual in the Linked Provider, and that the deleted IDF will turn to 'Pending Admission' status once the new Referral is accepted by the Oversight agency.



Users with the *Oversight Restricted Referral* caseload-based role can discontinue Referrals in the 'Pending Provider Response' and 'Denied By Recipient Provider' status.

Referral Module referrals

1915(i) staff will be able to see the referrals in Therap. Please identify the date you sent a referral and whether the response was denied or whether you discontinued the referral for lack of a response within the 2-business day timeframe. These details must be document in the conflict-of-interest section of the POC, or it will be returned to you to add this information in.