Member information available in Therap



When looking up member information, and you are the care coordination agency, you need to go up into the State Oversight account to look that information up. The State Oversight account is also where POCs are made, and referrals are also sent from.

> Care Coordinator Access to State Oversight account: POCs made here, Referrals done here, & Look up member info

State Oversight: The larger circle represents all the administrative things the state can do, that providers don't have access to.

Care Coordinators can go into service accounts to review service provider's case notes. As service providers only have access to an internal account

Care Coordinator Provider External Account: Think of this as a hallway you walk through to get to the State Oversight Account

Care Coordinator Provider Internal Account: <u>Case notes</u> <u>go here</u>

Service Account (Internal only) does a Unified Search for a POC from their Internal

Provider XYZ in their

If you're a service provider accessing a member's information, you only have an Internal account, your access is directed through specific pathways to retrieve the necessary details. Slides 3 & 4 will apply to service providers. If you are a care coordination agency, you can go to slide 5.

In your service provider account click on Individual Home Page





When you are in your service provider account, and you are trying to access a member's information through these tabs, you won't be able to. But you can access the information through looking up the Plan of Care by doing a Unified Search. All the information should be listed on the Plan of Care. There is a how-to posted on the <u>1915(i)</u> Provider and Guidance webpage on how to access a POC through a Unified Search.

If you do a Unified Search and you are not able to access a Plan of Care, contact the care coordinator letting them know. This is probably due to them creating the POC in their Internal account and not the State Oversight Account.

They can send you a PDF of the Plan of Care through an Scomm.

From this point forward, you will need to be in the State Oversight Account, when you are looking up a member's information through their Individual Home Page.

Member Eligibility & Medicaid Review Dates

Click on the <u>Custom Fields</u> section in the Individual Home Page.

NORTH

Dakota

Health & Human Services

Go To		
	Custom Fields o	
Address List		
Advance Directives	Individual	testt testt
Album		
Allergy Profile		
Assessment List	Oversight Fields: 1915	ii State Plan Amendment Oversight Account (SPA-NC
Attached Files	1915(i) Eligibility End	12/02/2024
Case Status	Date	
Contact List	1915(i) Eligibility Start	12/01/2025
Custom Fields	Date	
Diagnosis List	Medicaid	Traditional
Guardian List	Medicaid	00/30/2025
Health Profile	Redetermination Date	03/30/2023
Individual Demographic Form (IDF)		
Individual Details		
Individual Status History		
Insurance		
Oversight		
Pending Admission Notes		
Shared Contact List		
Team Members		

Member Guardian/Legal Decision Maker

Click on the Guardian List section

Case Status

Contact List Custom Fields Diagnosis List Guardian List Health Profile

Individual Details

Pending Admission Notes Shared Contact List Team Members

Insurance

Oversight

Individual Demographic Form (IDF)

Guardian List Go To ~ Guardian List of 'testt testt' Address List [fitter 15 ..., Records Advance Directives Guardian Type All Album Form 10 :- Name • **Guardian Authority** Established County State Established County Established Date Established End Date GUARD-SPAND-NE84Y2XG74VLK Hermione Granger Full Allergy Profile Assessment List Showing 1 to 1 of 1 entiy Attached Files

Legal Decision Maker o o

0	Name	Residential Address	Mailing Address	Phone	Email	Relationship with the Individual	Legal Decision Maker	Provider
	Hermione Granger	Bismarck, ND 58503, USA			hermione@hotmail.com	Guardian	Yes	SPA-ND (1915i State Plan Amendment Oversight Account)



Diagnosis

Click on the Diagnosis List section

Go To	^								
Address List Advance Directives		Active Diagnoses							
Album		Fitter							
Allergy Profile		Diagnosis Coding			DSM-		Diagnosis	Diagnosed	Time
Assessment List		Туре	Diagnosis Code	Description	5	Billable	Date	Ву	Zone
Attached Files		ICD-10	F90.2 -Attention-deficit hyperactivity disorder, combined		Yes	Yes	07/10/2024		US/Central
Case Status			type Primary						
Contact List									
Custom Fields									
Diagnosis List									
Guardian List									
Health Profile									

Individual Demographic Form (IDF)

Individual Details

Individual Status History

Insurance

Oversight

Pending Admission Notes

Shared Contact List

Team Members



Health & Human Services

WHODAS/DLA Score

Click on the Assessment List section. The type of assessment and score

will be listed.

Go To	
Address List Advance Directives	Assessment List
Album	Assessment list of 'testt testt'
Allergy Profile	
Assessment List	
Case Status	Filter Records
Contact List	Deleted
Custom Fields	Assessment Type Assessment Score Band/Percentile Assessment Date Effective Date Expiration Date Attachment Comments No Time Zone
Diagnosis List	Other 41 11/04/2024 WHODAS testdocx No US/Central
Guardian List	
Health Profile	ing 1 to 1 of 1 entry
Individual Demographic Form (IDF)	
Individual Details	
Individual Status History	
Insurance	
Oversight	N OR TH
Pending Admission Notes	Date Health & Human Services
Shared Contact List	Be- legendory.
Team Members	

Document Storage

From a member's Home Tab, under Modules you will see Document Storage. Click on Document Storage and then List. This will bring up any documents stored in the member's profile.

Modules	
Case Note	
 Document Storage 	
New	
List	
Search	
Individual Plan	
Individual Plan Agenda	
Personal Focus Worksheet	

Go To