

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.

The screenshot shows the Therap user management interface. At the top, there is a navigation bar with the Therap logo and 'Dashboard | Quick Links'. Below this, a user profile summary is displayed with fields for Provider, Program (No Program Selected), Profile (Initial), and Module (Search). A sidebar on the left contains menu items: Individual, Health, Agency, Admin (highlighted), Agency Reports, Individual Home Page, and Settings. The main content area is titled 'General' and contains a table of user management options:

Provider	Preferences Password Policy
User	New List Import from Excel Search Imported Excel Assign External System ID Self Password Reset
Title	New List Import from Excel Search Imported Excel
Change Password	User List
User Privileges	Manage Archive Legacy Archive Upto Jul 2011
Splash Message	Create Update/Delete

Agency Wide and Administrative Roles

Administrative Roles

- Super Admin
- Recipient Referral
- Recipient Referral View
- User
- IDF Admin
- Provider Setup
- Broadcast Admin
- Clinical Admin
- HT Admin
- Activity Tracking
- Admin Report
- Caseload
- User Privilege
- Shared Contact
- Custom User Group
- Reset Password
- Billing Restriction Override
- Scoring Method

Creating Referrals – Care Coordinators (The agency sending the referral to another agency) 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 into the Referral Module in your Oversight account and click New

Referral

- [New](#)
- [Worklist](#)
- [Accepted by Recipient Provider](#)
- [Waiting List](#)
- [Admission Completed](#)
- [Acknowledgement List](#)
- [Search](#)
- [Discontinue Referral](#)

Select the member from the list

Individual List

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

testt

15 ▼ Records

Last Name	First Name	Individual ID	Birth Date	Oversight ID
testt	testt			123456 (SPA-ND)

Showing 1 to 1 of 1 entry (filtered from 1,085 total entries)

Enter the following information:

Referral New

General Information

Individual testt testt +

Anticipated Admission Date 📅

Notification Level High Medium Low

Restricted Yes No

Recipient Type Referral to specific Provider
 Referral to a Region
 All state Referral

The referral packet will be sent to the provider you specify.

Region/Group ▼

Recipient Provider ▼

Oversight Agency 1915i State Plan Amendment Oversight Account

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.

The screenshot shows a dropdown menu for the 'Oversight Agency' field. The menu is open, displaying a list of agency names. The first option is '- Please Select -'. The list includes: 'A New Creation (CC1915ANC-ND)', 'A New Creation (ANC1915-ND)', 'Advocates for Change (AFC1915-ND)', 'Advocates for Change (CC1915AFC-ND)', 'Agape Community Support Services (CC1915AGAPE-ND)', 'Agape Community Support Services (AGAPE1915-ND)', 'All of Us in Recovery (CC1915AUR-ND)', and 'All of Us in Recovery (AUR1915-ND)'. A red box highlights the 'Oversight Agency' label and the dropdown menu. A green arrow points to 'All of Us in Recovery (CC1915AUR-ND)' with the text 'Send to this one for Care Coordination'. A blue arrow points to 'All of Us in Recovery (AUR1915-ND)' with the text 'Send to this one for supportive services'. The 'All of Us in Recovery (AUR1915-ND)' option is also highlighted with a red box.

In the **Service Description** box, describe 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 or Dollar Amount Requested
- Frequency Limit Requested
- Duration Limit Requested
- Indicate if these are New or Transferred Services

The screenshot shows the 'Service Description' form. The title 'Service Description' is in a blue header. Below the header, there is a text area with the following content: 'Service: Peer Support', 'Unit/Dollar Amt: _____', 'Frequency Limit requested: _____', 'Duration Limit requested: _____', and 'Indicated whether these new or transferred services?'. At the bottom of the text area, it says 'About 2812 characters left'.

You will attach the member’s plan of care, the ROI and any other document attachments 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.

Referral Packet					
CheckList	Attachment	Description	Uploaded By	Upload Date	Action
Plan of Care					Add File Scan File
Release of Information					Add File Scan File

[Attach Other File](#)

Add File

Please only upload data related to **'testt testt'**
The maximum file size allowed is 10 MB

Select File

Description

About 60 characters left

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

Referral Packet					
CheckList	Attachment	Description	Uploaded By	Upload Date	Action
1. Attachment 1	Isabella Johnson Lab Result.pdf (182.26 KB)	Lab Result for Isabella	Mia Cole, Program Manager	03/28/2024 10:15 AM	PDF View Remove
2. Attachment 2					Add File Scan File

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

Add Comments

This is an urgent referral request. Please review as soon as possible. ←

About 2930 characters left

Comments you may include 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 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.

The Referral form REF-DEMO-M344MUVZ27GAZ has been Successfully Sent to Provider

Your agency contact who handles referrals will monitor the Referral Module 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 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.

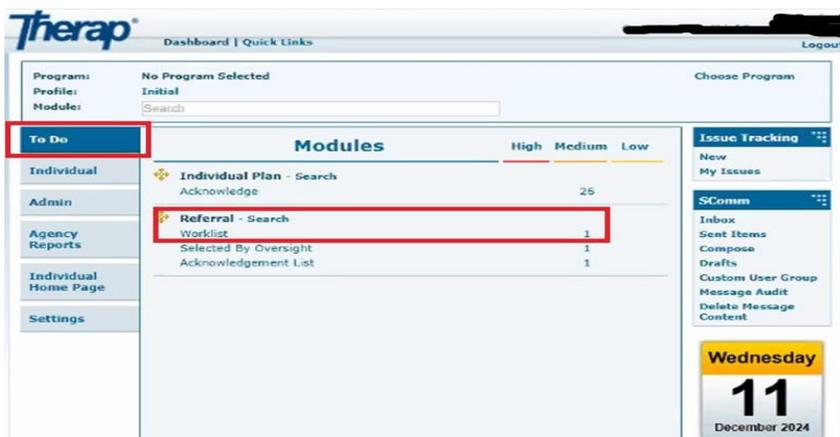
How to handle referrals in these cases

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.” The easiest option is to use 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.

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



Select referrals sent to your agency marked as Pending Provider Response

Worklist

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

Oversight Agency 1915i State Plan Amendment Oversight Account

Denial Reason

Service Description

test

Referral Packet

CheckList	Attachment	Description	Uploaded By	Upload Date	Action
Plan of Care	1915(i) Plan of Care 11.1.2024 (1).pdf (26.87 KB)		Mandy Dendy, Therap Admin	12/10/2024 1:31 PM	PDF View
Release of Information					

Add Comments

About 3000 characters left

You can **Accept** or **Deny** the referral. 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.

General Information

Individual testt testt (SPA-ND) ⓘ

Anticipated Admission Date 📅

Notification Level Medium

Recipient Provider ██████████

Oversight Agency 1915i State Plan Amendment Oversight Account

Denial Reason

- Please Select -
- Caseloads currently full, no available provider
- Not accepting referrals at this time
- Not currently offering this service at our agency
- Other

Service Description

test

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

If you are accepting a care coordination transfer from another agency, once you have accepted that referral for care coordination, 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.

Referral Accepted by receiving agency are sent back to Oversight Care Coordination Agency (the agency that sent the referral) for approval. This step is required.

Referral Accepted by Linked Provider and Sent Back to Oversight Agency

[\[Back to Top\]](#)

Users with the **Oversight Referral** caseload-based role can accept or deny referrals in the 'Accepted by Recipient Provider' status by clicking on the **Accepted By Recipient Provider** link in the 'Referral' section of the Oversight Dashboard.

Provider: 1915i State Plan Amendment Oversight [Switch Provider](#)
Account
Profile: External

Individual Demographics Worklist Search Custom Fields Insurance Contact List Quick Referral	Individual Home Page Individual List
Document Storage Individual New Search	Referral New Worklist Accepted by Recipient Provider (1) Waiting List Admission Completed Acknowledgement List Search Discontinue Referral

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

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 Denial Date
REF-DEMO-N5W3LTASVWVV4	Johnson, Isabella	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. 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.

General Information

Individual: [Redacted]

Anticipated Admission Date: 03/31/2024

Notification Level: High Medium Low

Restricted: Yes No

Recipient Provider: Demonstration Linked Provider One

Oversight Agency: Demonstration Oversight Provider

Service Description

Person Centered Support Plan and Services.

About 2958 characters left

Referral Packet

CheckList	Attachment	Description	Uploaded By	Upload Date	Action
1. Attachment	[Redacted].pdf (162.20 KB)	Lab Result for Isabella	Mia Cole, Program Manager	03/28/2024 10:15 AM	PDF View Remove
2. Attachment	[Redacted] Demographic Information.pdf (162.19 KB)	Isabella's Demographic Information	Mia Cole, Program Manager	03/28/2024 10:25 AM	PDF View Remove
4. Attachment	[Redacted] Immunization Information.pdf (162.11 KB)	Isabella's Immunization History	Mia Cole, Program Manager	03/28/2024 10:32 AM	PDF View Remove

[Attach Other File](#)

Comments

Overight Provider | Recipient Provider

Mia Cole Program Manager/ Demonstration Oversight Provider 03/28/2024 10:45 AM

This is an urgent referral request. Please review as soon as possible.

Jacob Anderson Administrator/ Demonstration Linked Provider One 03/28/2024 11:00 AM

The referral request has been reviewed and accepted.

Add Comments

About 3000 characters left

[Cancel](#) [Back](#)

[Copy Form](#) [Discontinue](#) [Accept](#) [Deny](#) [Update Referral](#) [Revert](#)

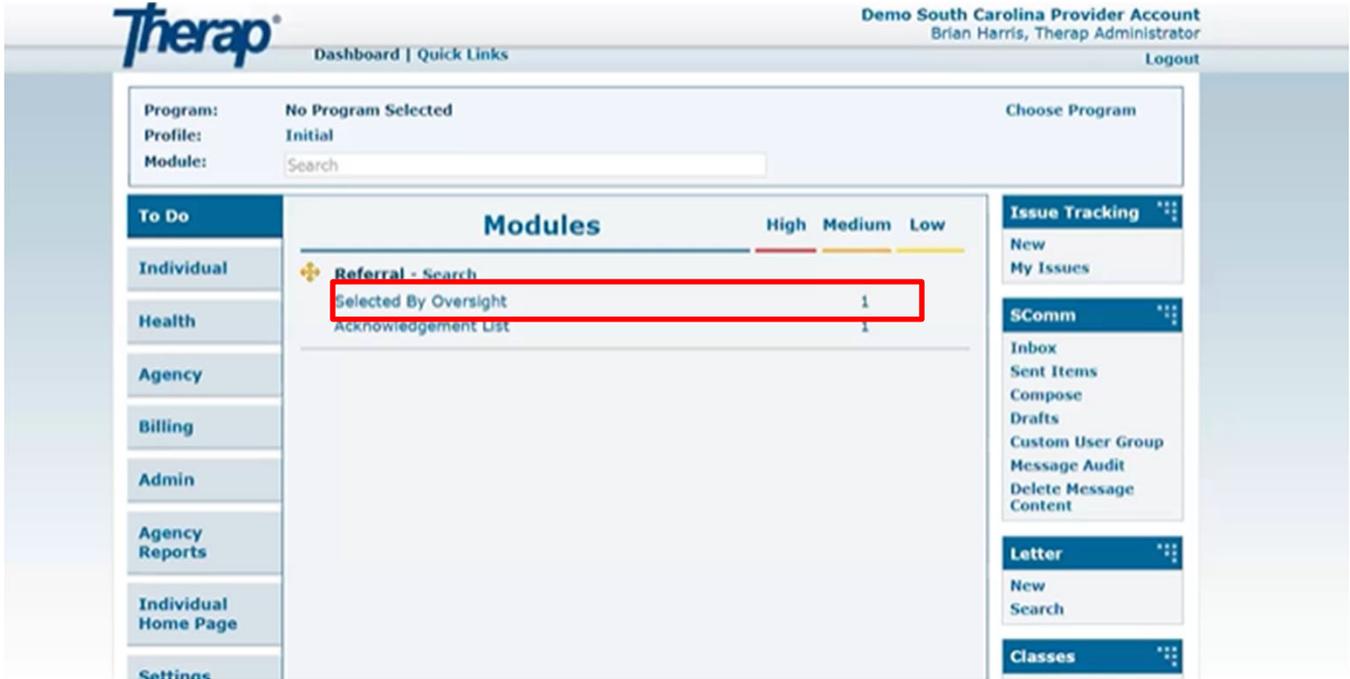
A confirmation message will be shown stating that the individual has been successfully admitted in Pending Approval status by sending referral.

The individual Isabella Johnson has been successfully admitted in Pending Approval status by sending Referral.

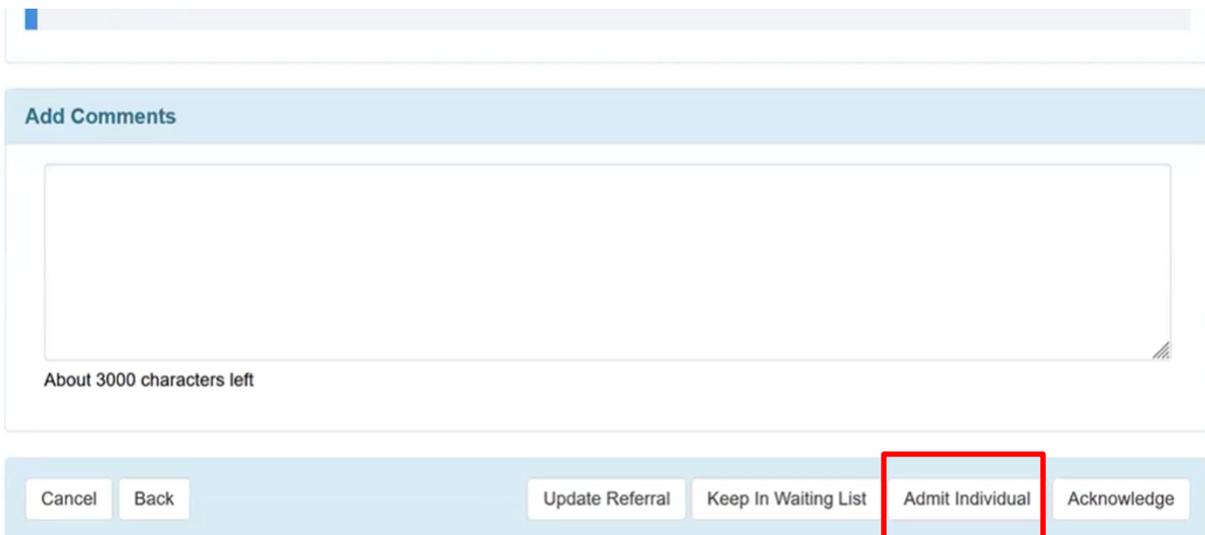
Actions

[Back to Form](#)
[Back to List](#)

Once the care coordination agency (the agency that sent you 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 want to finish up by admitting. This will bring you to that member's referral. Scroll down to the bottom of the referral and select Admit Individual.



Once a Referral gets accepted by a recipient provider, users with the *Oversight Restricted Referral* caseload-based role will be able to copy, update, and acknowledge the Referral form.

Referral Accepted By Recipient Provider ⓘ

General Information

Individual	Isabella Johnson ⓘ
Anticipated Admission Date	03/31/2024
Notification Level	Medium
Restricted	No
Recipient Provider	Demonstration Linked Provider One
Oversight Agency	Demonstration Oversight Provider

Cancel Back Copy Form Update Referral Acknowledge

Closing the Referral

Individual Admitted by Linked Provider

The agency sending the referral now needs to Close the Referral to finish it. To do so, in the Oversight account, you will go to the Referral section and click on Admission Completed. This will be an option, once the receiving agency has Admitted the individual.

Referral

- New
- Worklist
- Accepted by Recipient Provider
- Waiting List
- Admission Completed (1) ←
- Acknowledgement List
- Search
- Discontinue Referral

On the 'Admission Completed List' page, the Referrals of the individuals admitted into the Linked Provider account will be displayed. Click on the required Referral from the list.

Admission Completed 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
REF-DEMO-N5W3PKKYNWVVE	Johnson, Isabella	23456789 (DEMO-OS)	Medium	Admission Completed	Cole, Mia / Program Manager	03/31/2024	Demonstration Linked Provider One	03/28/2024	03/28/2024	03/28/2024		03/28/2024

The Referral is now in Admission Completed status from the other provider. You now need to scroll down and click the Close button.

Referral Admission Completed

General Information

Individual Isabella Johnson

Anticipated Admission Date 03/31/2024

Notification Level High Medium Low

Restricted Yes No

Recipient Provider Demonstration Linked Provider One

Oversight Agency Demonstration Oversight Provider

Service Description

Person Centered Support Plan and Services.

About 2958 characters left

Cancel Back
Copy Form **Close** Update Referral

A confirmation message will be displayed once the Referral has been successfully closed.

The Referral form REF-DEMO-M344MUVZ27GAZ has been Successfully Closed

Actions

- [Back to Form](#)
- [Link Individuals with Oversight ID](#)
- [Back to List](#)

Users with the *Oversight Restricted Referral* caseload-based role can copy and update Referrals in the 'Admission Completed' status.

Referral Admission Completed ⓘ

General Information

Individual	Isabella Johnson ⓘ
Anticipated Admission Date	03/31/2024
Notification Level	Medium
Restricted	No
Recipient Provider	Demonstration Linked Provider One
Oversight Agency	Demonstration Oversight Provider

Cancel Back Copy Form Update Referral

Acknowledgement List – Need to Acknowledge Referrals

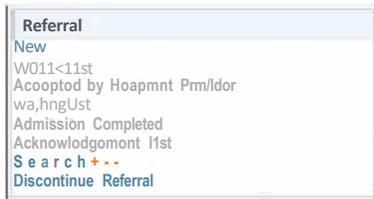
Modules	High	Medium	Low
 Referral - Search			
Worklist			1
Acknowledgement List			1

In the Provider's **To-Do tab for Referrals**, you will see an **acknowledgement list**. You will need to work that list and acknowledge actions taken.

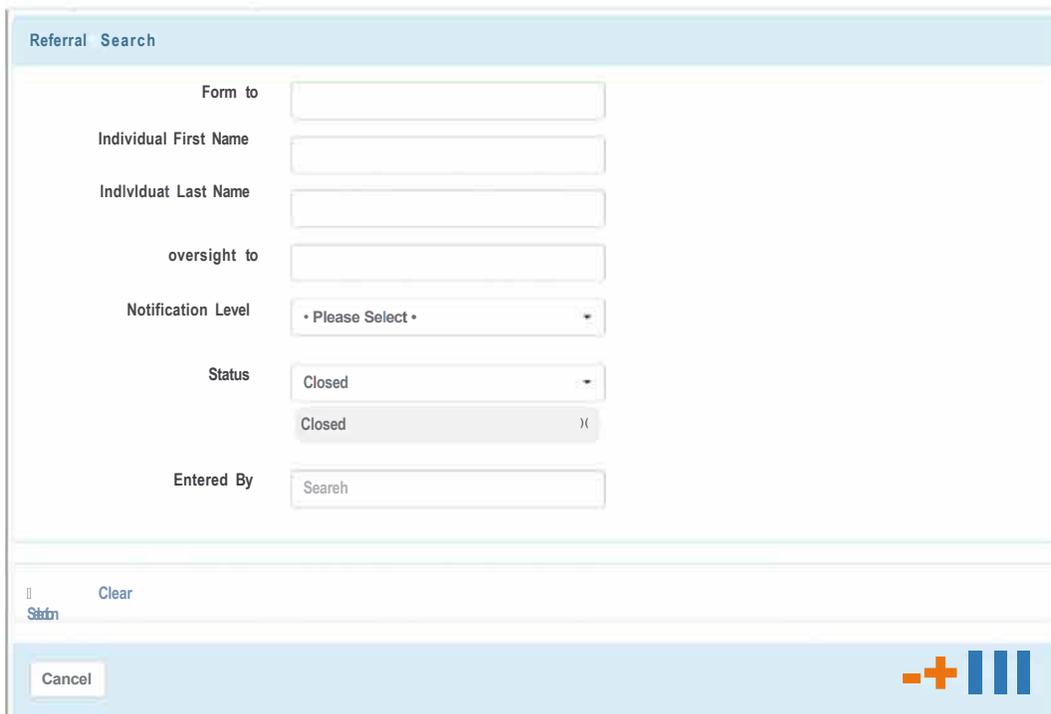
For example, if a referring provider discontinues a referral, the recipient provider should acknowledge that. If a recipient provider denies or accepts a referral the referring provider needs to acknowledge that.

Searching Referrals

1. Click on the Search link in the 'Referral' section on the Oversight Dashboard.



2. On the 'Referral Search' page, enter search parameters as appropriate and click on the Search button. You may also perform a blank search without entering any parameters which would show you Referrals of all status.



A screenshot of the 'Referral Search' form. The form has a light blue header with the text 'Referral Search'. Below the header, there are several input fields and dropdown menus. The fields are: 'Form to' (text input), 'Individual First Name' (text input), 'Individual Last Name' (text input), 'oversight to' (text input), 'Notification Level' (dropdown menu with 'Please Select' selected), 'Status' (dropdown menu with 'Closed' selected), and 'Entered By' (text input with 'Search' entered). Below the input fields, there is a 'Clear' button and a 'Search' button. At the bottom of the form, there is a 'Cancel' button and a navigation bar with an orange plus sign and three blue vertical bars.

On the search results page, click on the Referral form you wish to view.

Referral Search

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
REF-DEMO-N5W2PUYTFWXTS	Johnson, Isabella	23456789 (DEMO-OS)	Medium	Closed	Cole, Mia / Program Manager	03/31/2024	Demonstration Linked Provider One	03/28/2024	03/28/2024	03/28/2024		03/28/2024

Showing 1 to 1 of 1 entries Previous 1 Next

[New Search](#)
[Export to Excel](#)

[Cancel](#) [Back](#)

Discontinuing Referrals

1. Click on the **Discontinue Referral** link in the 'Referral' section of the Oversight Dashboard.

Referral

- New
- Worklist
- Accepted by Recipient Provider
- Waiting List
- Admission Completed (1)
- Acknowledgement List (1)
- Search
- Discontinue Referral ←

Referring providers may discontinue referrals once 2 full business days have passed since sending the referral. This is consistent with 1915(i) policies and a lack of response to the referral prior to the end of 2 business days is considered a denial.

2. On the 'Referral Search' page, enter necessary search parameters and click on the **Search** button.

Referral Search

Form ID	<input type="text"/>
Individual First Name	<input type="text"/>
Individual Last Name	<input type="text"/>
Oversight ID	<input type="text"/>
Notification Level	<input type="text" value="- Please Select -"/>
Status	<input type="text" value="- Please Select -"/>
Entered By	<input type="text" value="Search"/>

 Clear Selection



3. On the search results page, click on the **Discontinue** link in the Action column for the Referral forms you wish to discontinue.

Referral Search

Filter 15 Records

Action	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 Den Date
Discontinue	REF-DEMO-N5W3LTASVWV4	White, Joshua	56789012 (DEMO-OS)	Medium	Pending Provider Response	Cole, Mia / Program Manager	03/31/2024	Demonstration Linked Provider One	03/28/2024			
Discontinue	REF-DEMO-N5W3KQSJ6WVVS	Phillips, Chloe	45678901 (DEMO-OS)	Medium	Waiting	Hill, Matthew / Administrator	03/31/2024	Demonstration Linked Provider One	03/28/2024	03/28/2024	03/28/2024	
Discontinue	REF-DEMO-N5W3KLEFLWVWH	Miller, Alexander	34567890 (DEMO-OS)	Medium	Pending Provider Response	Sanders, John / Program Manager	03/31/2024	Demonstration Linked Provider One	03/28/2024			

Showing 1 to 3 of 3 entries Previous **1** Next

[New Search](#)
[Export to Excel](#)

4. A confirmation message will be displayed if the Referral has been successfully discontinued.

The form REF-DEMO-L8W4PVWZY4SNA has been successfully Discontinued

5. 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.

Deleted IDF exists in the Provider account for this Individual. Once Oversight/State accepts the Referral, the IOF in Provider account will be reverted to 'Pending Admission' status.

Referral New 0

General Information

Individual: Chloe Phillips 0

Oversight Agency: Demonstration Oversight Provider

Provider Individual Details

Provider Name	Referred Individual Status
rl Demonstration Linked Provider One (LINK1-NM)	Deleted

Cancel Back Continue

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

Documenting Referral Denials (actual and no-response) for Conflict-of-Interest Purposes

Scomm referrals

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.



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.