

UCR - OPI Referral Waitlist

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The purpose of this guide is to add OPI Referrals to the waitlist, change the referral status and update the RAT score in UCR.

Client Search

Do a Client Search to see if the Client is already in UCR

- Find Person Page
- Enter Search Criteria

Multnomah County **UAT - RealD** **UCR** **Your search returned no results** Logged in

Search ▾ Person Referral Administration ▾ Contract Deliverables ▾ Contract Payment Management ▾ NMTP Transfer Caseloads Reports ▾ LTSS Reports NMTP Reports

Find Person

Last Name: First Name: Nickname/Alias:
SSN: Prime #: Alt ID:
Date of Birth: Client ID:

Didn't find who you were looking for? [Create New Person](#)

Show entries Filter:

											Mark Duplicates		
	Last Name ^	First Name ^	MI ^	Nickname ^	DOB ^	SSN ^	Prime # ^	Alt ID ^	Gender ^	OA Status ^	UCR Status ^	Primary	Duplicate
No person found.													

Add A Client

If your search is returned with “no results”, Add A Client.

- Create New Person

Multnomah County UAT - RealID UCR

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Find Person

Last Name: Doo First Name: Scooby Nickname/Alias:
SSN: Prime #: Alt ID:
Date of Birth: Client ID:
Search Clear

Didn't find who you were looking for? [Create New Person](#)

Show 25 entries Filter:
Last Name First Name MI Nickname DOB SSN Prime # Alt ID Gender OA Status UCR Status Primary Duplicate
No person found.

- Enter the Name, Date of Birth and Prime if applicable

Multnomah County UAT - RealID UCR

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Find Person

Last Name: Doo First Name: Scooby Nickname/Alias:
SSN: Prime #: Alt ID:
Date of Birth: Client ID:
Search Clear

Didn't find who you were looking for? [Create New Person](#)

Show 25 entries Filter:
Last Name First Name
Doo Scooby

Add Person

Last Name: Doo First Name: Scooby Date of Birth: 01/01/1950 Declined To State:
SSN: Prime #: Alternate ID:
Save Cancel

Add a Referral

- Edit Person Page
- Referrals Tab
- + Add New Referral

UAT - RealID **UCR**

Search ▾ Person Referral Administration ▾ Contract Deliverables ▾ Contract Payment Management ▾ NMTP Transfer Caseloads Reports ▾ LTSS Reports NMTP Reports

Edit Person

Name: DOO, SCOOPY **DOB:** 01/01/1950 **Age:** 73
Prime Number: **Alt ID:** MCES0QR1 **SSN:** **Medicare #:**
Gender: **Primary Language:**

Other System Information
OA Import Status: Not Imported
UCR Client ID: 170625 **MOW Client ID:** **GetCare ID:**

Demographics Contact Info Financial OAA Notes Client Alerts **Referrals** 0

Active Referrals 0 **Closed Referrals** 0 **Request History**

Add New Referral

Not of active referrals only. See history tabs for list of all referrals/services.

Show 25 ▾ entries

Referral ID	Program	Status	Referred On	Assigned To/Staff
No referrals found for this person.				

Showing 0 to 0 of 0 entries

1. Program: **OPI Services**
2. Referral Received On:
3. Source of Referral:
4. Assigned To:
5. Staff Member:

Add Program Referral

1 Program: OPI Services

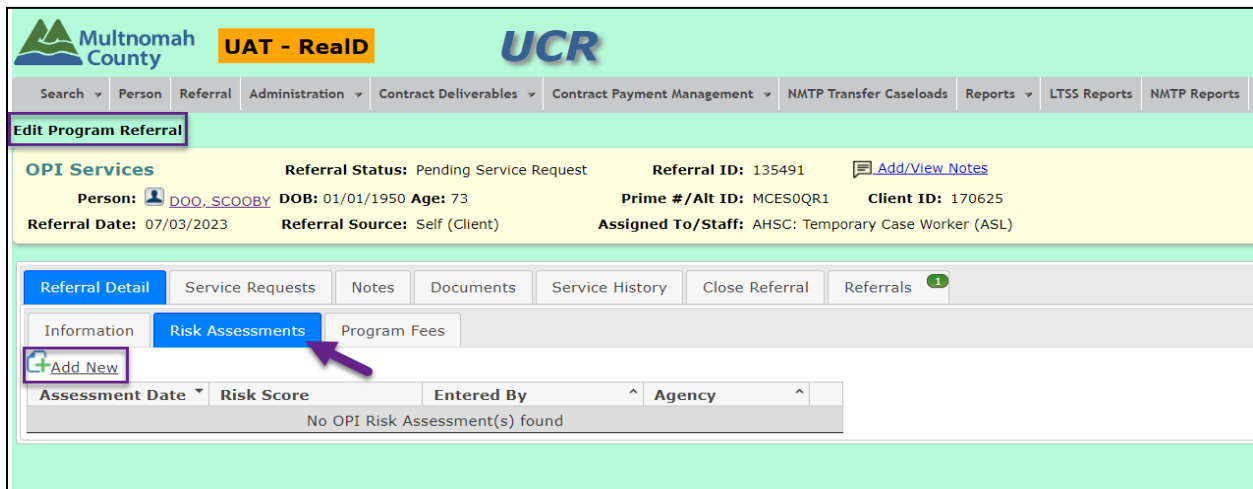
2 Referral Received On: 07/03/2023 **3** Source of Referral: Self (Client)

4 Assigned To: AHSC **5** Staff Member: Case Worker, Temporary (ASL)

Save **Cancel**

Add a Risk Assessment

- Edit Program Referral Page
- Referral Detail Tab
- Risk Assessment Tab
- + Add New



Multnomah County **UAT - RealID** **UCR**

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 [Add/View Notes](#)

Person: **DOO, SCOOPY** DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCES0QR1 Client ID: 170625

Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail Service Requests Notes Documents Service History Close Referral Referrals 1

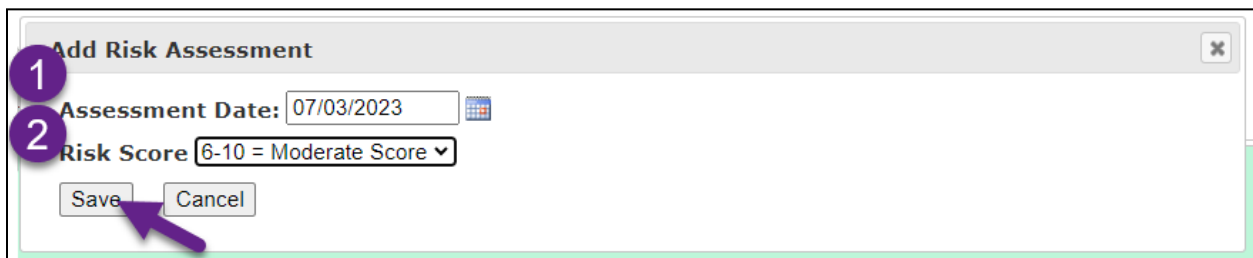
Information **Risk Assessments** Program Fees

Add New

Assessment Date Risk Score Entered By Agency

No OPI Risk Assessment(s) found

1. Assessment Date:
2. Risk Score:



Add Risk Assessment

1 Assessment Date: 07/03/2023

2 Risk Score 6-10 = Moderate Score

Save Cancel

Updating the Service Request Date

The Risk Assessment should be updated once a year. If a client is already on the OPI Waitlist and you are updating the Risk Assessment, also update the Service Request Date to be in sync with the Risk Assessment date.

Revised 10/17/2023

Step 1. Update the Risk Assessment Score:

1. Assessment Date
2. Risk Score

Add Risk Assessment

1 **Assessment Date:** 09/01/2023

2 **Risk Score:** 6-10 = Moderate Score

Save Cancel

The most recent Assessment Date will display at the top.

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 139585 Add/View Notes

Person: DOO, SCOOPY DOB: 01/01/1950 Age: 74 Prime #/Alt ID: MCLVBSY5 Client ID: 172026

Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FH - SAGE: Temporary Case Worker (DWA)

Referral Detail Service Requests Notes Documents Service History Close Referral Referrals 1

Information Risk Assessments Program Fees

+ Add New

Assessment Date	Risk Score	Entered By	Agency
12/01/2023	Risk Score : 11-17 = High Score	Fitzgerald, Michelle	ADVSD-CS
08/01/2023	Risk Score : 6-10 = Moderate Score	Fitzgerald, Michelle	ADVSD-CS

Step 2. Update the Service Request Date

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 139585 Add/View Notes

Person: DOO, SCOOPY DOB: 01/01/1950 Age: 74 Prime #/Alt ID: MCLVBSY5 Client ID: 172026

Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FH - SAGE: Temporary Case Worker (DWA)

Referral Detail Service Requests Notes Documents Service History Close Referral Referrals 1

+ Add Service Request

Show 25 entries

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units
08/01/2023	Waitlist	Not Sent	OPI Case Management				

Showing 1 to 1 of 1 entries

Revised 10/17/2023

- Update the Requested On date:

Edit Program Referral

OPI Services **Referral Status:** Pending Service Request **Referral ID:** 139585 [Add/View Notes](#)

Person: DOO, SCOOPY **DOB:** 01/01/1950 **Age:** 74 **Prime #/Alt ID:** MCLVBSY5 **Client ID:** 172026

Referral Date: 08/01/2023 **Referral Source:** Self (Client) **Assigned To/Staff:** FH - SAGE: Temporary Case Worker (DWA)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals ¹

[Add Service Request](#)

Show entries Filter:

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
08/01/2023	Waitlist	Not Sent	OPI Case Management					

Request Detail Service Authorization Service Events Status History

Service Request Detail

Service Requested: OPI Case Management (36)

Requested On: **Amount Requested:** \$

Request Status:

Effective On:

Showing 1 of 1 entries

The Service Request Date will now reflect the latest Risk Assessment Date without changing the initial referral date.

Edit Program Referral

OPI Services **Referral Status:** Pending Service Request **Referral ID:** 139585 [Add/View Notes](#)

Person: DOO, SCOOPY **DOB:** 01/01/1950 **Age:** 74 **Prime #/Alt ID:** MCLVBSY5 **Client ID:** 172026

Referral Date: **Referral Source:** Self (Client) **Assigned To/Staff:** FH - SAGE: Temporary Case Worker (DWA)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals ¹

[Add Service Request](#)

Show entries Filter:

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency	Paid Amount
12/01/2023	Waitlist	Not Sent	OPI Case Management						

Showing 1 to 1 of 1 entries

Revised 10/17/2023

Reviewing the Waitlist will reflect the latest Risk Assessment date.

Find Service Request

Program: OPI Services Service Group: Case Management Service Category: OPI Case Management
Request Date: Start End GOP Sent: All
Request Status: Waitlist
Assigned Agency: Select One Staff Member: Select One
Prime/Alt ID: Referral ID:
Search Clear

[Export To Excel](#)

Show 25 entries

Ref ID ^	Client Name ^	Program ^	Service ^	Assigned To ^	Staff ^	Request Date ^	Status ^	Status Rsn ^	RAT Score ^
139585	Doo, Scooby	OPI Services	OPI Case Management	FH - SAGE	Temporary Case Worker (DWA)	12/01/2023	Waitlist		11-17 = High Score

Add Service Request

When adding service requests for the Waitlist, **ONLY** add OPI Case Management.

- Service Request Tab
- + Add Service Request

UAT - RealID **UCR**

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 [Add/View Notes](#)
Person: DOO, SCOOBY DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCES0QR1 Client ID: 170625
Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals 1

Add Service Request

Show 25 entries Filter:

Request Date ^	Request Status ^	GOP Sent ^	Service ^	Provider ^	Request Amount ^	Auth Amount ^	Auth Units ^	Frequency ^
No service request found.								

Showing 0 to 0 of 0 entries First Prev

1. Request Date
 - ✗ Close All
 - Open the + Expander next to "Case Management"
2. ✓ OPI Case Management (**ONLY**)

Multnomah County **UAT - RealD** **UCR**

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 [Add/View Notes](#)

Person: [DOO, SCOOBY](#) DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCES0QR1 Client ID: 170625

Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals 1

[Add Service Request](#)

Show 25 entries

Request Date Request Status GOP Sent Service

Showing 0 to 0 of 0 entries

Add Service Request

1 Request Date: 08/03/2023

Select all services this person is requesting:

✗ Close All + Open All

✗ Case Management

+ ☒ OPI Case Management (36)

+ In-Home Services

+ Special Needs

Save Cancel

- Open the + Expander
 1. Request Detail
 2. Request Status: Waitlist

Multnomah County **UAT - RealD** **UCR**

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 [Add/View Notes](#)

Person: [DOO, SCOOBY](#) DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCES0QR1 Client ID: 170625

Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals 1

[Add Service Request](#)

Show 25 entries

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
08/03/2023	Pending Authorization	Not Sent	OPI Case Management					

1 **Request Detail** Service Authorization Service Events Status History

Service Request Detail

Service Requested: OPI Case Management (36)

Requested On: 08/03/2023 Amount Requested:

2 Request Status: Pending Authorization

Approved

Waitlist

Denied

Withdrawn

Save Cancel

Showing 1 to 1 of 1 entries

Revised 10/17/2023

Review Waitlist

- Search Tab
- Find Service Request

The screenshot shows the Multnomah County UCR system interface. The top navigation bar includes the Multnomah County logo, 'UAT - RealID', and the 'UCR' logo. Below this is a search bar and a dropdown menu with options: Search, Person, Referral, Administration, Contract Deliverables, Contract Payment Management, NMTP Transfer Caseloads, Reports, LTSS Reports, and NMTP Reports. The 'Search' dropdown is open, showing a list of search options: Find Person, Find Referral, Find MDT Referral, Find LTSS Referral, Find NMTP Referral, Find Family Caregiver Referrals, Find Service Request (highlighted with a red box), Find Service Event, Find Non-Client Activity, Find Provider, Find User, Find Assessments Due, and View LTSS Caseloads. The main form area has fields for First Name, Nickname/Alias, Prime #, Alt ID, and Client ID. Below these fields is a table with columns: Name, MI, Nickname, DOB, SSN, Prime #, Alt ID, Gender, OA Status, UCR Status, Primary, and Mark Dupli. The table currently displays 'No person found.'

1. Program: OPI Services
2. Service Group: Case Management
3. Service Category OPI Case Management
4. Request Status: Waitlist
5. Assigned Agency:

The screenshot shows the 'Find Service Request' form in the Multnomah County UCR system. The form has the following fields and values:

- Program: OPI Services
- Service Group: Case Management
- Service Category: OPI Case Management
- Request Date: Start (empty) End (empty)
- Request Status: Waitlist
- Assigned Agency: IMPACT-NW SE DC
- Staff Member: Select One
- Prime/Alt ID: (empty)
- Referral ID: (empty)
- GOP Sent: All

Below the form is a table with columns: Ref ID, Client Name, Program, Service, Assigned To, Staff, Request Date, Status, Status Rsn, and RAT Score. The table displays 5 entries, all with a status of 'Waitlist'.

Ref ID	Client Name	Program	Service	Assigned To	Staff	Request Date	Status	Status Rsn	RAT Score
126008		OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	06/13/2023	Waitlist		1-5 = Low Score
130612		OPI Services	OPI Case Management	IMPACT-NW SE DC		03/28/2023	Waitlist		1-5 = Low Score
126007		OPI Services	OPI Case Management	IMPACT-NW SE DC		05/31/2023	Waitlist		1-5 = Low Score
127020		OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	05/25/2023	Waitlist		1-5 = Low Score
125994		OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	03/09/2022	Waitlist		

Showing 1 to 25 of 40 entries

Revised 10/17/2023

Export to Excel

Multnomah County **UAT - RealD** **UCR**

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Find Service Request

Program: OPI Services Service Group: Case Management Service Category: OPI Case Management
Request Date: Start End GOP Sent: All
Request Status: Waitlist
Assigned Agency: IMPACT-NW SE DC Staff Member: Select One
Prime/Alt ID: Referral ID:
Search Clear

Export To Excel

Show 25 entries

Ref ID	Client Name	Program	Service	Assigned To	Staff	Request Date	Status	Status Rsn	RAT Score
126008		OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	06/13/2023	Waitlist		1-5 = Low Score
130612		OPI Services	OPI Case Management	IMPACT-NW SE DC		03/28/2023	Waitlist		1-5 = Low Score
126007		OPI Services	OPI Case Management	IMPACT-NW SE DC		05/31/2023	Waitlist		1-5 = Low Score
127020		OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	05/25/2023	Waitlist		1-5 = Low Score
125994		OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	03/09/2022	Waitlist		

Showing 1 to 25 of 40 entries

1. Select Row 1
2. Data Tab
3. Select Filter
 - a. Sort by RAT Score
 - i. OR
 - b. Sort by Request Date

File Home Insert Page Layout Formulas Data Review View Help

Get Data From Web From Table/Range Recent Existing Refresh All Queries & Connections Sort Filter Clear Reapply Text to Columns Flash Fill Remove Duplicates Validation Data Consolidate Relationships Manage Data Model What-If Analysis Forecast Group Ungroup Subtotal Show Detail Hide Detail

Program_Referral_ID

Program	Referral	Client	First Name	Last Name	Prime Number	Alternate	Program Name	Service	Assigned To	Staff Name	Request Date	Status	Status Reason	Status Reason Other	RAT Score
	125980	15848					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	4/20/2022	Waitlist			6-10 = Moderate Score
	125994	151023					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	3/9/2022	Waitlist			1-5 = Low Score
	125868	72882					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	10/6/2022	Waitlist			1-5 = Low Score
	125941	159151					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	11/30/2022	Waitlist			1-5 = Low Score
	125857	168354					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	11/1/2022	Waitlist			1-5 = Low Score
	127011	112					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	10/31/2022	Waitlist			1-5 = Low Score
	126004	10523					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	5/24/2023	Waitlist			1-5 = Low Score
	127020	39342					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	5/25/2023	Waitlist			1-5 = Low Score
	127644	41949					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	1/20/2023	Waitlist			1-5 = Low Score
	127642	49718					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	12/22/2022	Waitlist			1-5 = Low Score
	127014	150957					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	1/5/2023	Waitlist			1-5 = Low Score

Revised 10/17/2023

Approved Status

Use this Status to transition a Client from the Waitlist to an **active** OPI Services Client.

- Select the Ref ID

Find Service Request

Program: OPI Services Service Group: Case Management Service Category: OPI Case Management

Request Date: Start End GOP Sent: All

Request Status: Waitlist

Assigned Agency: Select One Staff Member: Select One

Prime/Alt ID: Referral ID:

Search Clear

[Export To Excel](#)

Show 25 entries

Ref ID ^	Client Name ^	Program ^	Service ^	Assigned To ^	Staff ^	Request Date ^	Status ^	Status Rsn ^	RAT Score ^
136413	DOO, Scooby	OPI Services	OPI Case Management	FRIENDLY-HSE-WEST DC	Temporary Case Worker	09/01/2023	Waitlist		6-10 = Moderate Score

- Service Requests Tab
- Open the **Green +** Expander

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 136413 [Add/View Notes](#)

Person: DOO, SCOOPY DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949

Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals 1

[Add Service Request](#)

Show 25 entries

Request Date ^	Request Status ^	GOP Sent ^	Service ^	Provider ^	Request Amount ^	Auth Amount ^	Auth Units ^
09/01/2023	Waitlist	Not Sent	OPI Case Management				

Showing 1 to 1 of 1 entries

1. Request Detail Tab
2. Request Status: Approved

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 136413 [Add/View Notes](#)

Person: DOO, SCOOPY DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949

Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals 1

[Add Service Request](#)

Show 25 entries Filter:

Request Date ^	Request Status ^	GOP Sent ^	Service ^	Provider ^	Request Amount ^	Auth Amount ^	Auth Units ^	Frequency ^
09/01/2023	Waitlist	Not Sent	OPI Case Management					

1 Request Detail Service Authorization Service Events Status History

Service Request Detail

Service Requested: OPI Case Management (36)

Requested On: 09/01/2023 Amount Requested:

2 Request Status: Approved

Effective On:

Save Cancel

Showing 1 to 1 of 1 entries First Previous

1. Service Authorization Tab
- UCR - OPI Referral Waitlist

Revised 10/17/2023

2. Authorized From Date: add the "Approved" date

Edit Program Referral

OPI Services Referral Status: Active Referral ID: 136413 [Add/View Notes](#)
Person: [DOO, SCOOPY](#) DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949
Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals ¹

[Add Service Request](#)

Show entries Filter:

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
09/01/2023	Approved	Not Sent	OPI Case Management					

Request Detail **Service Authorization** Service Events Status History

☐ GOP Sent

Authorized From: **Authorized To:**

No Provider selected [Select Provider](#)

Authorized Units:

Last Modified By: michellief **Modified On:** 9/22/2023 4:24:38 PM

Showing 1 to 1 of 1 entries [First](#) [Previous](#)

Denied Status

Use this Status if a Client is no longer qualified for OPI Services

- Select the Ref ID

Multnomah County **UAT - RealD** **UCR**

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Find Service Request

Program: Service Group: Service Category:

Request Date: Start End GOP Sent:

Request Status:

Assigned Agency: Staff Member:

Prime/Alt ID: Referral ID:

[Export To Excel](#)

Show entries

Ref ID	Client Name	Program	Service	Assigned To	Staff	Request Date	Status	Status Rsn	RAT Score
135491	Doo, Scooby	OPI Services	OPI Case Management	AHSC	Temporary Case Worker (ASL)	08/03/2023	Waitlist		6-10 = Moderate Score

Showing 1 to 1 of 1 entries

- Service Requests Tab

Revised 10/17/2023

- Open the **Green +** Expander

Multnomah County **UAT - RealID** **UCR**

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 [Add/View Notes](#)

Person: [DOO, SCOOPY](#) DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCE50QR1 Client ID: 170625

Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals ¹

[+ Add Service Request](#)

Show entries Filter:

	Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
	08/03/2023	Waitlist	Not Sent	OPI Case Management					

Showing 1 to 1 of 1 entries First Prev

1. Request Detail Tab
2. Request Status: Denied

Multnomah County **UAT - RealID** **UCR**

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 [Add/View Notes](#)

Person: [DOO, SCOOPY](#) DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCE50QR1 Client ID: 170625

Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals ¹

[+ Add Service Request](#)

Show entries Filter:

	Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
	08/03/2023	Waitlist	Not Sent	OPI Case Management					

Request Detail Service Authorization Service Events Status History

Service Request Detail

Service Requested: OPI Case Management (36)

Requested On: Amount Requested:

Request Status:

Effective On:

Showing 1 to 1 of 1 entries First Prev

- Status Reason:

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- If “Other”, narrate in the text box

UAT - RealID

UCR

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 Add/View Notes

Person: DOO, SCOOPY DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCES0QR1 Client ID: 170625

Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail Service Requests Notes Documents Service History Close Referral Referrals 1

Add Service Request

Show 25 entries Filter:

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
08/04/2023	Waitlist	Not Sent	OPI Case Management					

Request Detail Service Authorization Service Events Status History

Service Request Detail

Service Requested: OPI Case Management (36)

Requested On: 08/04/2023 Amount Requested:

Request Status: Denied

Effective On:

Status Reason: Select One

If Other, Explain: Financial need not established
Not a Multico Resident
Paid by Medicaid/Other
Other

Save Cancel

Withdrawn Status

Use this Status if a Client decides not to join the OPI Program

- Select the Ref ID

UAT - RealID

UCR

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Find Service Request

Program: OPI Services Service Group: Case Management Service Category: OPI Case Management

Request Date: Start End GOP Sent: All

Request Status: Waitlist

Assigned Agency: AHSC Staff Member: Select One

Prime/Alt ID: Referral ID:

Search Clear

[Export To Excel](#)

Show 25 entries

Ref ID	Client Name	Program	Service	Assigned To	Staff	Request Date	Status	Status Rsn	RAT Score
135491	DOO, SCOOPY	OPI Services	OPI Case Management	AHSC	Temporary Case Worker (ASL)	08/03/2023	Waitlist		6-10 = Moderate Score

Showing 1 to 1 of 1 entries

- Service Requests Tab

Revised 10/17/2023

- Open the **Green +** Expander

Multnomah County **UAT - RealID** **UCR**

Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 [Add/View Notes](#)
Person: [DOO, SCOOPY](#) DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCES0QR1 Client ID: 170625
Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals ¹

[Add Service Request](#)

Show entries Filter:

	Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
	08/03/2023	Waitlist	Not Sent	OPI Case Management					

Showing 1 to 1 of 1 entries First Prev

1. Request Detail Tab
2. Request Status: Withdrawn

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Search Person Referral Administration Contract Deliverables Contract Payment Management NMTP Transfer Caseloads Reports LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 [Add/View Notes](#)
Person: [DOO, SCOOPY](#) DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCES0QR1 Client ID: 170625
Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals ¹

[Add Service Request](#)

Show entries Filter:

	Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
	08/03/2023	Waitlist	Not Sent	OPI Case Management					

1 Request Detail Service Authorization Service Events Status History

Service Request Detail

Service Requested: OPI Case Management (36)

Requested On: Amount Requested:

Request Status:

Effective On:

Showing 1 to 1 of 1 entries First Prev

- Status Reason

Revised 10/17/2023

- If “Other”, narrate in the text box.

Multnomah County **UAT - RealID** **UCR**

Search ▾ Person Referral Administration ▾ Contract Deliverables ▾ Contract Payment Management ▾ NMTP Transfer Caseloads Reports ▾ LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Active Referral ID: 135491 [Add/View Notes](#)
Person: [DOO_SCOBY](#) DOB: 01/01/1950 Age: 73 Prime #/Alt ID: MCES0QR1 Client ID: 170625
Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals ¹

[+ Add Service Request](#)

Show **25** entries Filter:

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
08/04/2023	Denied	Not Sent	OPI Case Management					

Request Detail Service Authorization Service Events Status History

Service Request Detail

Service Requested: OPI Case Management (36)

Requested On: 08/04/2023 Amount Requested:

Request Status: Withdrawn

Effective On:

Status Reason: **Select One**
Select One
Client Deceased
Loss of Contact
Other
Remove

If Other, Explain:

Save Cancel

Closing a Referral

After changing a Service Request Status to “**Denied**” or “**Withdrawn**”, close the referral.

1. Close Referral Tab
2. Open the **Green +** Expander

Multnomah County **UAT - RealID** **UCR**

Search ▾ Person Referral Administration ▾ Contract Deliverables ▾ Contract Payment Management ▾ NMTP Transfer Caseloads Reports ▾ LTSS Reports NMTP Reports

Edit Program Referral

OPI Services Referral Status: Active Referral ID: 139645 [Add/View Notes](#)
Person: [DOO_SCOO](#) DOB: 01/01/1950 Age: 74 Prime #/Alt ID: MCKIXTED Client ID: 172049
Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FH - SAGE: Temporary Case Worker (DWA)

Referral Detail Service Requests Notes Documents Service History **Close Referral** Referrals ¹

Referral Status Change History Referral opened on 1/4/2024 by

[+ Change Referral Status](#)

Show **10** entries Filter:

Status	Status Changed On	Reason	Comment	Status Changed By	Modified On
Active		Request Created			01/04/2024

1. Closed On:
2. Reason Closed: **Services Withdrawn/Denied**
3. Comment:

Change Referral Status

1

Closed On

08/04/2023

2

Reason Closed

Services Withdrawn/Denied

3

Comment:

Save

Cancel