# UCR - OPI Referral Waitlist

UCR - OPI Referral Waitlist Client Search Add A Client Add a Referral Add a Risk Assessment Updating the Service Request Date Add Service Request Review Waitlist Export to Excel Approved Status Denied Status Withdrawn Status Closing a Referral

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         Vour search returned no results	Logged ir
Search v Person Referral Administration v Contract Deliverables v Contract Payment Management v NMTP Transfer Caseloads Reports v LTSS Reports	NMTP Reports
Find Person	
Last Name: Doo First Name: Scooby Nickname/Alias:	
SSN: Prime #: Alt ID:	
Date of Birth: 0 Client ID:	
Search Clear	
Dian t find who you were looking for? <u>create new retson</u>	
Show 25 v 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

County UAT - RealD UCR Vour 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: 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 v entries	er:
	Mark Duplicates
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	AT - RealD	UCR			Logged in
Search 🛩 Person Referral	Administration 👻 Contract Deliverables	Contract Payment Management      NMTP Transfer Caseloa	ds Reports 👻 LTSS Reports N/	MTP Reports	
Find Person					
Last Name: Doo	First Name: Scooby	Nickname/Alias:			
SSN:	Prime #:	Alt ID:			
Date of Birth:	U	Client ID:			
Search Clear					
Didn't find who you were look	king for? Create New Person				
Show 25 🗸 entries			Filte	er:	
Last Name ^ Firs	Add Person				×
Scool	by Last Name: Doo SSN: Save Cancel	First Name: Scooby Prime#:	Date of Birth: 01/01/1 Alternate ID:	1950 Declined To State: 🗌	

### Add a Referral

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

Multnomah County UAT - RealD	U	CR				
Search 🛩 Person Referral Administration 🛩	Contract Deliverables 👻	Contract Payment Management 👻	NMTP Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports
Edit Person						
Name: DOO, SCOOBY	DOB: 01/01/1950 Age	e: 73				
Prime Number:	Alt ID: MCESOQR1 SSN	N: Medicare #:				
Gender: Primary Lang	juage:					
Other System Information OA Import Status: Not Imported						
UCR Client ID: 170625	10W Client ID:	GetCare ID:				
Demographics Contact Info Financi	al OAA Notes	Client Alerts Referrals				
Active Referrals OClosed Referrals	Request History					
List of active referrals only. See history tabs for lis	t of all referrals/services.					
Add New Referral						
Show 25 🗸 entries						
Referral ID Program	^ Sta	atus ^ Referred On * Ass	signed To/Staff			
		No referral	s 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	×
2 Program: OPI Services v Referral Received On: 07/03/2023 Source of Referral: Self (Client) v	
4 Assigned To: AHSC	
Save Cancel	

#### Add a Risk Assessment

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

Multnomah County UAT - RealD	U	CR				
Search 🛩 Person Referral Administration 🛩	Contract Deliverables 👻	Contract Payment Management 👻	NMTP Transfer Caseloads	Reports 👻 L	TSS Reports	NMTP Reports
Edit Program Referral						
OPI Services Referral St.	atus: Pending Service Re	equest Referral ID: 135	491 FAdd/View N	lotes		
<b>Person:</b> 🚨 <u>DOO, SCOOBY</u> DOB: 01/01/	1950 <b>Age:</b> 73	Prime #/Alt ID: MCE	SOQR1 Client ID: 1	70625		
Referral Date: 07/03/2023 Referral So	urce: Self (Client)	Assigned To/Staff: AHS	C: Temporary Case Work	er (ASL)		
Referral Detail Service Requests No	otes Documents	Service History Close Refe	erral Referrals 💶			
Information Risk Assessments Prog	gram Fees					
GAdd New						
Assessment Date * Risk Score	Entered By	^ Agency	^			
No OPI F	Risk Assessment(s) fou	ind				

- 1. Assessment Date:
- 2. Risk Score:

Add Risk Assessment	×
Assessment Date: 07/03/2023	
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.

Step 1. Update the Risk Assessment Score:

- 1. Assessment Date
- 2. Risk Score

	Add Risk Assessment	×
$\frac{1}{2}$	Assessment Date: 09/01/2023	
4	Save Cancel	

The most recent Assessment Date will display at the top.

Edit Program Referral				
OPI Services Person: Doco Referral Date: 08/01/2	Referral Status:.SCOOBYDOB: 01/01/1950 #023Referral Source:	Pending Service Request Age: 74 Self (Client)	Referral ID: 139 Prime #/Alt ID: MC Assigned To/Staff: FH	9585 El Add/View Notes CLVBSY5 Client ID: 172026 - SAGE: Temporary Case Worker (DWA)
Referral Detail Se	ervice Requests Notes	Documents Servic	e History Close Ref	ferral Referrals
Information Risk	Assessments Program F	ees		
Add New				
Assessment Date *	Risk Score	Entered By	^ Agency	<b>^</b>
12/01/2023	Risk Score : 11-17 = High Score	Fitzgerald, Michelle	ADVSD-CS	G.
08/01/2023	Risk Score : 6-10 = Moderate Score	Fitzgerald, Michelle	ADVSD-CS	G

Step 2. Update the Service Request Date

Edit Program Referral						
OPI Services	Referral Status: Pending	Service Request	Referral ID	: 139585	Add/View Notes	
Person: 🚨 <u>DOO, SCOOB</u>	<b>DOB:</b> 01/01/1950 Age: 74		Prime #/Alt ID	MCLVBSY5	Client ID: 17202	26
Referral Date: 08/01/2023	Referral Source: Self (Clie	nt)	Assigned To/Staff	FH - SAGE: Tem	porary Case Worker ([	OWA)
Referral Detail Service Re	equests Notes Docur	nents Servic	e History Clos	e Referral Ref	ferrals 💶	
Add Service Request						
Show 25 🗸 entries						
Request Date * Requ	est Status ^ GOP Sent ^	Service ^	Provider ^ Req	uest Amount ^	Auth Amount ^	Auth Units ^
08/01/2023 Waitlis	t Not Sent	OPI Case Management				
Showing 1 to 1 of 1 entries						

• Update the Requested On date:

Edit Program Referral	
OPI Services Referral Status: Pending Service Request Referral ID: 139585 E Add/View Notes	
Person: L DOO, SCOOBY 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	
Add Service Request	
Show 25 • 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: 12/01/2023 Amount Requested: \$	
Request Status: Waitlist	
Effective On:	
Save Cancel Remove	
Showing 1 of 1 entries	First Previ
Showing 1-1 of 1 childs	

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: L DOO, SCOOBY D	OB: 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 (D)	VA)
Referral Detail Service Reque	ests Notes Documents Serv	rice History Close Referral	Referrals 1	
Add Service Request				
Show 25 🕶 entries				Filter:
Request Date * Request	Status ^ GOP Sent ^ Service ^	Provider * Request Amou	Int ^ Auth Amount ^	Auth Units ^ Frequency ^ Paid Amount ^
<ul> <li>12/01/2023 Waitlist</li> </ul>	Not Sent OPI Case Management			
Showing 1 to 1 of 1 envies				First Previous 1 Next Last

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

Multnomah County	AT - RealD	U	CR					
Search 🛩 Person Referral	Administration 🛩 Cor	ntract Deliverables 👒	Contract Payment Mar	nagement 👻	NMTP Transfer Ca	seloads Repo	rts 👻 LTSS Reports	NMTP Reports
Edit Program Referral								
OPI Services Person: DOO, SCO Referral Date: 07/03/2023	Referral Status OBY DOB: 01/01/195 Referral Source	Pending Service R <b>Age:</b> 73 Self (Client)	equest Refer Prime #/ Assigned To	ral ID: 1354 Alt ID: MCES /Staff: AHSC	91 P. Add 50QR1 Clien C: Temporary Ca	<mark>1/View Notes</mark> nt ID: 170625 se Worker (AS	5 L)	
Referral Detail Service	Requests Notes	Documents	Service History	Close Refer	ral Referra	Is 1		
Show 25 🗸 entries	-							Filter:
Request Date * Re	quest Status ^ GO	P Sent ^ Servio	e ^ Provider ^	Request An	nount ^ Aut	h Amount ^	Auth Units ^	Frequency ^
			No service	request four	nd.			
Showing 0 to 0 of 0 entries								First Prev

- 1. Request Date
  - XClose All
  - Open the Green + Expander next to "Case Management"
- 2. V OPI Case Management (**ONLY**)

Multnomah UAT - Real		CR				
County		CA				
Search 👻 Person Referral Administration 🛩	Contract Deliverables 🔻	Contract Payment Management 👻	NMTP Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports
Edit Program Referral						
OPI Services Referral S	tatus: Pending Service Re	equest Referral ID: 135	491 E Add/View N	lotes		
Person: 💶 <u>DOO, SCOOBY</u> DOB: 01/01	/1950 <b>Age:</b> 73	Prime #/Alt ID: MCE	SOQR1 Client ID: 1	70625		
Referral Date: 07/03/2023 Referral So	ource: Self (Client)	Assigned To/Staff: AHS	SC: Temporary Case Work	er (ASL)		
Referral Detail Service Requests N	otes Documents	Service History Close Refe	erral Referrals 💶			
Add Service Request						
Show 25 • entries					F	Filter:
Request Date * Request Status ^	GOP Sent ^ Servic	Add Service Request			× 1	Frequency ^
		Request Date: 08/03	/2023			
Showing 0 to 0 of 0 entries		Select all services this pers	son is requesting:			First Pre
		Close All Open All				
		Case Management				
		OPI Case Management	(36)			
		O In-Home Services				
		Special Needs				
		Save Cancel				
		*				

- Open the Green + 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         The service Request	
Show 25 v entries	Filter:
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^	Frequency ^
08/03/2023 Pending Not Sent OPI Case Authorization Not Sent Management	
Request Detail Service Authorization Service Events Status History	
Service Request Detail	
Service Requested: OPI Case Management (36)	
Requested On: 08/03/2023 Amount Requested:	
Request Status:       Pending Authorization         Pending Authorization         Save       Cancel         Waitlist         Dening	
Showine 1 to 1 of 1 enti Withdrawn	First Previo

### Revised 10/17/2023 Review Waitlist

- Search Tab
- Find Service Request

	Multnomah County	UAT	- RealD		UCR							
	Search v Person Refer	rral Adm	inistration 👻	Contract Deliverab	les 👻 Contrac	Payment Managemen	t 🛩 N/	MTP Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Report	rts
	Find Person											
•	Find Referral					7						
	Find MDT Referral	_	First	Name:		Nickname/Alias	:					
	Find LTSS Referral		Pri	ime #:		Alt ID	·					
1	Find NMTP Referral	0	)			Client ID	:					
	Find Family Caregiver Referrals											
	Find Service Request											
S	Find Service Event									Filter:		
	Find Non-Client Activity										Mark I	Dupli
	Find Provider	lai	me 🔺 MI 🔺	Nickname ^	DOB ^ SSN	^ Prime # ^ A	t ID ^	Gender ^ OA St	atus ^ UC	CR Status ^	Primary	Du
	Find User					No person found.						
	Find Assessments Due											
	View LTSS Caseloads											

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

		ultn	omah <mark>U</mark> ty	IAT - F	RealD		UCF	2						
	Search 👻	Per	on Referral	Administ	ration 👻 Con	tract Deliverables 👻	Contract Payme	ent Management 👻	NMTP Transfer	Caseloads	Reports 👻	LTSS Reports	NMTP Reports	
	ind Servic	e Req	uest			2		3						
	P	rogra	m: OPI Servic	ces		Service Grou	p: Case Manage	ment v Se	rvice Categor	y: OPI Cas	e Manageme	ent 🗸		
	Reque	est Da	te: Start		📑 End				GOP Sen	t: All	~			
	Reques	t Stat	us: Waitlist		-									
( 5	ssigned	Agen		W SE DC	~	Staff Membe	er: Select One	~						
Т	Prime	e/Alt	(D:		1	Referral I	D:							
	Search	Clea	ar											
E	Export To Ex	cel												
	Show 25	✓ ent	ries											
	Ref ID ^		Client Name	<b>^</b>	Program ^	Service ^	Assigned To ^	Staff	^	Request	Date 1	Status ^	Status Rsn ^	RAT Score ^
	<u>126008</u>				OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case	Worker	06/	13/2023 W	aitlist		1-5 = Low Score
	<u>130612</u>				OPI Services	OPI Case Management	IMPACT-NW SE DC			03/	28/2023 W	aitlist		1-5 = Low Score
	<u>126007</u>				OPI Services	OPI Case Management	IMPACT-NW SE DC			05/	31/2023 W	aitlist		1-5 = Low Score
	<u>127020</u>	1			OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case	Worker	05/	25/2023 W	aitlist		1-5 = Low Score
	<u>125994</u>				OPI Services	OPI Case Management	IMPACT-NW SE	Temporary Case	Worker	03/	09/2022 W	aitlist		
	Showing 1	to 25	of 40 entries											

Export to Excel

Mul	tnom unty	ah UAT - F	RealD		UCF	2					
Search 👻	Person	Referral Administ	ration 👻 Cont	tract Deliverables	- Contract Payme	nt Management 👻 NMTP	Transfer Caseloads	Reports 👻 L	TSS Reports N	IMTP Reports	
Find Service	Reques	t									
Pro	gram:	OPI Services		✓ Service Gro	up: Case Manager	ment - Service C	ategory: OPI Cas	e Management	~		
Request	Date:	Start	End End		3	G	OP Sent: All	~			
Request 5	itatus:	Waitlist	-								
Assigned A	gency:	IMPACT-NW SE DC	~	Staff Memb	er: Select One	~					
Prime/	Alt ID:		_	Referral	ID:						
Search	Clear										
Export To Exce	1										
Show 25 🗸	er ries										
Ref ID ^	Clie	ent Name 🔷 *	Program ^	Service ^	Assigned To ^	Staff	^ Request	Date ^ Sta	tus ^ s	Status Rsn 个	RAT Score ^
126008			OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	06/	13/2023 Waitl	list		1-5 = Low Score
<u>130612</u>			OPI Services	OPI Case Management	IMPACT-NW SE DC		03/	28/2023 Wait	list		1-5 = Low Score
126007			OPI Services	OPI Case Management	IMPACT-NW SE DC		05/	31/2023 Waitl	list		1-5 = Low Score
127020			OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	05/	25/2023 Wait	list		1-5 = Low Score
125994			OPI Services	OPI Case Management	IMPACT-NW SE	Temporary Case Worker	03/	09/2022 Wait	list		
Showing 1 to	25 of 4	0 entries									

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

F	ile Home Insert	Page Layout	Formu 2	Data	Review Vie	w Help	Across	🔉 Tell me what yo	u want to do								
الم G Da	et From From From ta * Text/CSV Web Ri	Table/ Recent inge Sources	Existing Connections	Refresh All -	Queries & Con Properties Edit Links	nections A	Sort Filt	er Clear	Text to Fli Columns F	ash Remove D Fill Duplicates Valid	ta Consolidate	Relationship	Manage Data Model A	What-If F Inalysis -	orecast Sheet	Ungroup Subtotal	Show Detail Hide Detail
	Ger Gr mar	Storm Data		Que	ies & connectio	113	3011 0				Data 10013			TOTECa	34	Oddinie	
A	1 * I ×	$\sqrt{-f_N}$	Program_Re	ferral_ID													
	Δ	B	c	D	F	F	G		н	1 I	1		к	1.1	м	N	0
(1)	Program Referral 👻	Client 👻 First	Nan 🗸 Last	Nan - Pri	me Numb -	Alternate	Program N	an 🖌 Se	rvice 💌	Assigned To	Staff N	ame 🗐	Request Da	Stati 👻	Status Rease	Status Reason Ot	h 👻 RATScore 👻
2	125980	15848					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	4/20/2022	aitlist			6-10 = Moderate score
3	125994	151023					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	3/9/2022	W. Hist			
4	125868	72882					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	10/6/2022	Waitlist			1-5 = Low Score
6	125941	159151					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	11/30/2022	Waitlist			1-5 = Low Score
7	125857	168354					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	11/1/2022	Waitlist			
8	127011	112					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	10/31/2022	Waitlist			1-5 = Low Score
9	126004	10523					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	5/24/2023	Waitlist			1-5 = Low Score
10	127020	39342					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	5/25/2023	Waitlist			1-5 = Low Score
12	127644	41949					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	1/20/2023	Waitlist			1-5 = Low Score
13	127642	49718					OPI Service	s OPI Case N	lanagement	IMPACT-NW SE D	Temporary Ca	se Worker	12/22/2022	Waitlist			1-5 = Low Score
14	127014	150957					OPI Service	s OPI Case N	lanagement.	IMPACT-NW SE D	Temporary Ca	se Worker	1/5/2023	Waitlist			1-5 = Low Score

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

• Select the Ref ID

Find Service Reques	st									
Program:	OPI Services		<ul> <li>Service Group</li> </ul>	Case Manageme	nt  Service Category:	OPI Case I	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	3									
Ref ID ^ Cli	ent Name 🔺	Program ^	Service ^ A	ssigned To ^ S	taff	^ Reque	est Date ^	Status	^ Status Rsn ^	RAT Score ^
136413 🚨 Doo	<u>, Scooby</u>	OPI Services M	PI Case FR lanagement WE	ENDLY-HSE- Te	mporary Case Worker	C	9/01/2023	Waitlist		6-10 = Moderate Score
4										

- Service Requests Tab
- Open the Green + Expander

Edit Program Referral						
OPI Services	Referral Status: Pending S	Service Request	Referral ID: 1	36413	Add/View Notes	I
Person: 💶 DOO, SCOOBY	DOB: 01/01/1960 Age: 63		Prime #/Alt ID: M	1C302JWQ	Client ID:	170949
Referral Date: 08/01/2023	Referral Source: Self (Clier	nt) 🗚	Assigned To/Staff: F	RIENDLY-HSE-WE	EST DC: Temporary C	ase Worker
Referral Detail Service Req	uests Notes Docum	ents Service	e History Close R	eferral Refe	errals 💶	
Add Service Request						
Show 25 🗸 entries	-					
Request Date * Request	st Status ^ GOP Sent ^	Service ^ I	Provider ^ Reque	st 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         Image: Comparison of C	
Referral Detail         Service Requests         Notes         Documents         Service History         Close Referral         Referrals         Service Request	
Show 25 v entries	Filter:
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^	Frequency ^
OP/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: 09/01/2023 Im Amount Requested:	
2 Request Status: Approved  Pending Authorization Approved Vvalitist Save Cancei F Denied Withdrawn	
Showing 1 to 1 of 1 entries	First Previo

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

Edit Due and an Defensed				
Edit Program Referral				
OPI Services Ref	erral Status: Active	Referral ID: 136413	Add/View Notes	
Person: 🚨 DOO, SCOOBY DOE	3: 01/01/1960 Age: 63	Prime #/Alt ID: MC302JW	Q Client ID: 170949	
Referral Date: 08/01/2023 Ref	erral Source: Self (Client) As	ssigned To/Staff: FRIENDLY	-HSE-WEST DC: Temporary Case Work	er
Referral Detail Service Request	s Notes Documents	Service History Clos	e Referral Referrals	
Add Service Request				
Show 25 🗸 entries				Filter:
Request Date * Request St	atus ^ GOP Sent ^ Ser	vice ^ Provider ^ Re	quest Amount ^ Auth Amount	Auth Units A Frequency
O9/01/2023 Approved	Not Sent OPI ( Mana	Case agement		
Request Detail Service Autho	rization Service Events	Status History		
GOP Sent				
Authorized From: 09/01/2023	Authorized To:			
No Provider selected		Select Provider		
Authorized Units:				
Last Modified By: michellef	Modified On: 9/22	/2023 4:24:38 PM		
Save Cancel				
Showing 1 to 1 of 1 entries				First Previou

### **Denied Status**

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

• Select the Ref ID

Mu	Multnomah County UAT - RealD UCR										
Search - Person Referral Administration - Contract Deliverables - Contract Payment Management - NMTP Transfer Caseloads Reports - LTSS Reports NMTP F											
Find Service	Find Service Request										
Program: OPI Services   Request Date: Start   End GOP Sent:   Assigned Agency: All <   Prime/Alt ID: Referral ID:											
Export To Exce	<u>el</u>										
Show 25 🗸	entries										
Ref ID ^	Clie	ent Name	Program	^ Service ^ A	Assigned To ^	Staff	^ Request Date ^	Status ^	Status Rsn 4	* RAT Score	
<u>135491</u>	135491     Doo, Scooby     OPI Services     OPI Case Management     AHSC     Temporary Case Worker (ASL)     08/03/2023 Waitlist     6-10 = Moderate Score										
Showing 1 to	olof1∈	entries									

• Service Requests Tab

UCR - OPI Referral Waitlist

• Open the Green + Expander

Multnomah County	- RealD	CR								
Search 🛩 Person Referral Admin	inistration 👻 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       Image: Add/View Notes         Person: Image: DOD, 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     Image: Close Referral       CAdd Service Request     Add Service Request     Add Service Request     Add Service Request     Add Service Request										
Show 25 🖌 entries	Show 25 • entries Filter:									
Request Date * Request	t Status * GOP Sent * Servic	e ^ Provider ^ Request	Amount ^ Auth Amo	ount ^ Auth Units ^	Frequency ^					
OPI Case Management         OPI Case										
Showing 1 to 1 of 1 entries										

- 1. Request Detail Tab
- 2. Request Status: Denied

_														
	MI	ultnom ounty	ah <mark>U</mark>	IAT - Rea	ID		UC	R						
	Search 👻	Person	Referral	Administratio	n ⊮ Co	ontract Deliverab	les 👻 Co	ontract Payment	Management	✓ NMTP	P Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports
Edi	it Prograi	n Referra	al											
C	PI Ser	vices son: 💵	<u>DOO, SCC</u>	Referra	<b>il Statu</b> /01/19!	<b>is:</b> Pending Ser 50 <b>Age:</b> 73	vice Requ	iest Re Prime	eferral ID: 1 #/Alt ID: M	35491 ICES0QR	Add/View	<u>Notes</u> 170625		
F	Referral D	ate: 07/	03/2023	Referra	l Sourc	e: Self (Client)		Assigned	To/Staff: A	HSC: Ter	mporary Case Worl	(ASL)		
	Referral	Detail	Service	e Requests	Notes	s Documer	ts S	ervice History	Close R	eferral	Referrals 💶			
6	Add Ser	vice Req	uest											
5	Show 25	▼ entrie	es											Filter:
	Req	iest Dat	te 🔭 Re	quest Statu	5 ^ G	OP Sent ^ S	ervice	^ Provide	r ^ Reque	st Amo	unt ^ Auth Am	ount ^ A	uth Units ^	Frequency ^
1	•	08/03/2	023 Wai	tlist	No	ot Sent O M	PI Case anageme	ent						
Ť	Reques	t Detail	Servi	ice Authorizat		Service Even	s Sta	atus History						
	Service I	Request	Detail											
	Service	Reques	ted: OP	I Case Manag	ement	(36)								
	Red	quested	<b>On:</b> 08	/03/2023		Amoun	t Reque	sted:						
		iest Sta	tus: Wa	aitlist ading Authorize	✓									
	E	ffective	On: Ap	proved	uon									
	Save	Cancel		nied thdrawn										
ę	Showing 1	to 1 of	1 entries											First Previo

• Status Reason:

• If "Other", narrate in the text box

Multnomah County UAT - RealD UCR									
Search * Person Referral Administration * Contract Deliverables * Contract Payment Management * NMTP Transfer Caseloads Reports * LTSS Reports NMTP Referration	ports								
Edit Program Referral									
OPI Services     Referral Status: Pending Service Request     Referral ID: 135491     EAdd/View Notes       Person: L 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									
L+Add Service Request									
Show 25 Ventries									
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^ Freque	ency 1								
O8/04/2023 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 III Amount Requested:									
Request Status: Denied V									
Effective On:									
Status Reason:       Select One         If Other,       Select One         Explain:       Financial need not established         Not a Multico Resident       Paid by Medicaid/Other         Other       Other									
Showing 1 to 1 of 1 optrion	Previo								

### Withdrawn Status

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

• Select the Ref ID

Mult	Multnomah County UAT - RealD UCR											
Search 🛩 P	erson Referral	Administration 👻	Contract Deliverables	✓ Contract Page	yment Management 👻	NMTP Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports			
Find Service Re	Find Service Request											
Program: OPI Services   Request Date: Start   End GOP Sent:   Assigned Agency: All <   Prime/Alt ID: Referral ID:												
Export To Excel												
Show 25 🗸 e	entries											
Ref ID ^	Client Name	Program	^ Service ^ A	ssigned To ^	Staff	^ Request Date ^ 9	Status ^	Status Rsn '	RAT Score			
<u>135491</u>	<u>Doo, Scooby</u>	OPI Service	s OPI Case Al Management Al	HSC	Temporary Case Worker (ASL)	08/03/2023	Waitlist		6-10 = Moderate Score			
Showing 1 to 1	Showing 1 to 1 of 1 entries											

• Service Requests Tab

UCR - OPI Referral Waitlist

• Open the Green + Expander

Multnomah County UAT - RealD UCR									
Search 🛛 Person Referral Administration 🗸 Contract Deliverables 🗸 Contract Payment Management 🗸 NMTP Transfer Caseloads Reports 🗸 LTSS Reports NMTP	P 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     Image: Close Referral       Chadd Service Request     Add Service Request     Image: Close Referral     Referrals     Image: Close Referral									
Show 25 v entries	r:								
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^ Free	quency ^								
O         08/03/2023 Waitlist         Not Sent         OPI Case Management									
Showing 1 to 1 of 1 entries	rst Previou								

- 1. Request Detail Tab
- 2. Request Status: Withdrawn

	mah y	JAT - RealD	U	CR							
Search 🔻 Pers	n Referral	Administration 👻	Contract Deliverables 🔻	Contract Payment Management 👻	NMTP Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports			
Edit Program Ref	dit Program Referral										
OPI Services Person: Referral Date:	DOO, SCO 7/03/2023	Referral St DOB: 01/01/ Referral So	atus: Pending Service R (1950 <b>Age:</b> 73 urce: Self (Client)	equest Referral ID: 135 Prime #/Alt ID: MCE Assigned To/Staff: AHS	491 Add/View M SOQR1 Client ID: 5 GC: Temporary Case Work	lotes 170625 er (ASL)					
Referral Detai	Service	e Requests No	otes Documents	Service History Close Refe	erral Referrals 1						
Show 25 • er	Add Service Request         Show 25 ▼ entries         Filter:										
08/0	Request Date *       Request Status *       GOP Sent *       Service *       Provider *       Request Amount *       Auth Amount *       Auth Units *       Frequency         08/03/2023       Waitlist       Not Sent       OPI Case Management       OPI Case       OPI Case										
Request Det	Request Detail         Service Authorization         Service Events         Status History										
Service Requ	Service Request Detail Service Requested: OPI Case Management (36)										
2 Request Request 5 Effecti Save Can	Requested On: 08/03/2023   Request Status: Waitlist   Pending Authorization Approved Pending Authorization Approved   Save Cancel   Denied Writhdrawn										
Showing 1 to	of 1 entries	5						First Previo			

• Status Reason

• If "Other", narrate in the text box.

Multnomah UAT - RealD UCR
Search y Person Referral Administration y Contract Deliverables y Contract Payment Management y NMTP Transfer Caseloads Reports y LTSS Reports NMTP Reports
Edit Program Referral
OPI Services       Referral Status: Active       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
G Add Service Request
Show 25 • entries Filter:
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^ Frequency ^
OR/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         If Other,       Select One         Loss of Contact       Other         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

Multnom	ah <mark>U</mark>	AT - RealI		UCR							
Search 🛩 Person	Referral	Administration 👻	Contract Deliverables	✓ Contract Payment Manag	gement 👻 NM	TP Transfer Caseloa	ads Reports 🛩	LTSS Reports	NMTP Reports		
Edit Program Referr	Edit Program Referral										
OPI Services         Referral Status: Active         Referral ID: 139645         Add/View Notes           Person:         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	Referral Detail Service Requests Notes Documents Service History Close Referral Referrals										
2 ferral Status C	oferral Status Change History Referral opened on 1/4/2024 by										
Change Referral Status											
Show 10 👻 entri	Show 10 • entries Filter:										
Status		^ Sta	tus Changed On ^	Reason	^ Commen	t ^ Sta	tus Changed	Ву	^ Modified	On ^	
Active				Request Created					01/04,	/2024	

- 1. Closed On:
- 2. Reason Closed: Services Withdrawn/Denied
- 3. Comment:
- UCR OPI Referral Waitlist

Change Referral Status	ж
Closed On 08/04/2023	
Posson Closed Services Withdrawn/Denied	
Comment:	]
Save Cancel	00/04