Therap Referral Module

Adapted from [Referral for Oversight Providers](#)
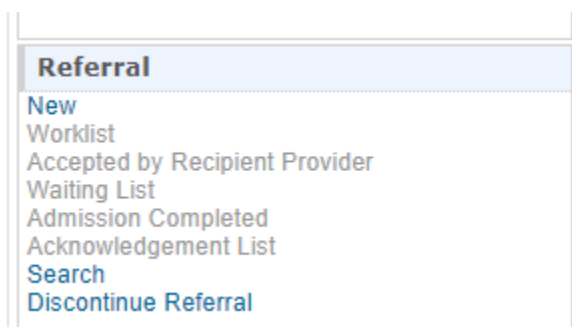
Created January 2025, last modified 1/16/25

Contents

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.
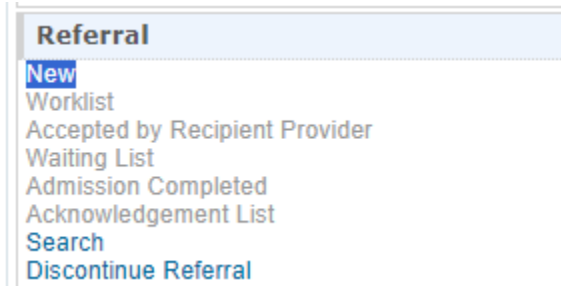
This will link to individuals in your provider account. You want your agency care coordinators to have this access.

Creating Referrals – Care Coordinators

For providers who do not already provide supportive services to a member

Care coordinators will be able to create referrals for supportive services – i.e. peer support, housing support, non-medical transportation, etc.
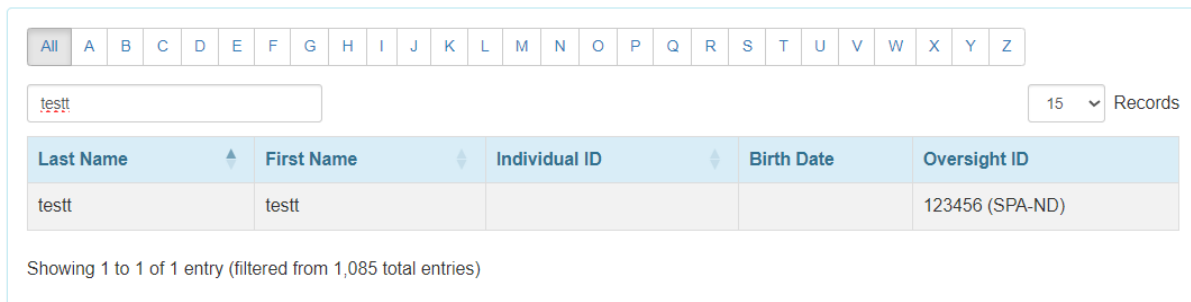
Go into the Referral Module and click New

Referral
New
Worklist
Accepted by Recipient Provider
Waiting List
Admission Completed
Acknowledgement List
Search
Discontinue Referral

Click New

Select your member from the list
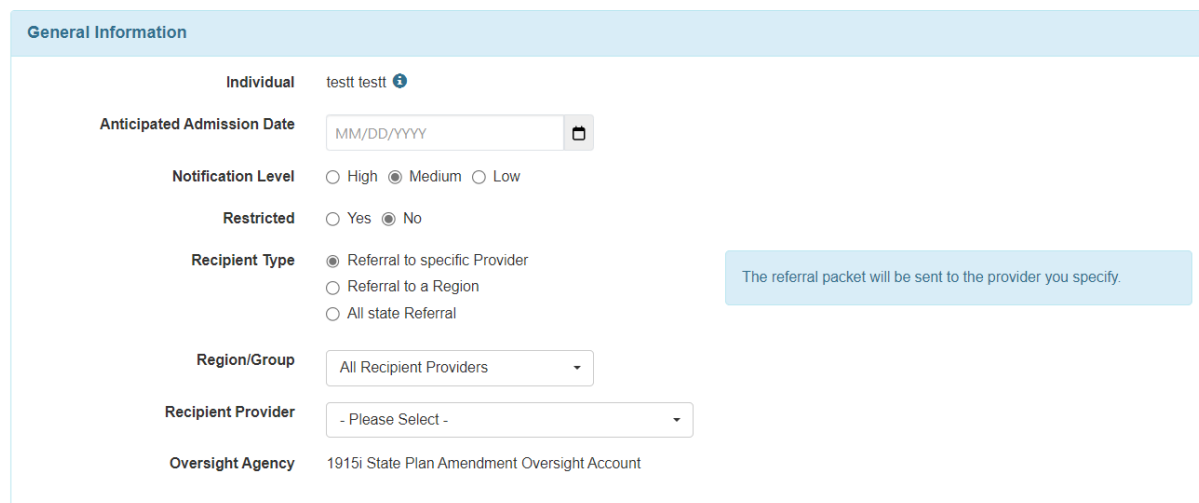
Individual List

| | 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	MM/DD/YYYY 📅
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	All Recipient Providers ▾
Recipient Provider	- Please Select - ▾
Oversight Agency	1915i State Plan Amendment Oversight Account

Anticipated Admission Date: Date 3 business days after the current date to allow the provider 2 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: Select

Recipient Type   ◉ Referral to specific Provider

Region/Group

All Recipient Providers ▾

Region/Group: Select

Recipient Provider: Select a provider's NON-Care Coordination Agency (i.e. the one without CC in the name)

i.e., you would select All of Us in Recovery (AUR1915-ND) and NOT the CC1915AUR-ND provider.

Oversight Agency	
	- Please Select -
	A New Creation (CC1915ANC-ND)
ion	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)
	All of Us in Recovery (AUR1915-ND)

In the **Service Description** box, describe what service you are sending the referral for, i.e. Peer Support, and provide:

- Units or Dollar Amount Requested
- Frequency Limit Requested
- Duration Limit Requested
- Indicate if these are New or Transferred Services

Service Description

Service: Peer Support

Unit/Dollar Amt: _____
Frequency Limit requested: _____
Duration Limit requested: _____

Indicated whether these new or transferred services?

About 2812 characters left

You will attach the member's plan of care in the Referral Packet section by clicking Add File

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

You can add the member's Plan of Care by uploading it along with a ROI to share member's plan of care and any other document attachments you may want to add.

You will need to upload the .pdf version of the member's plan of care. 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. You can use the **Individual Document Lookup** feature. You can click on WHODAS, Diagnosis, and Eligibility Application to attach any documents that are uploaded to Therap in the Document Storage module.

Add File

×

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

Select File | Choose or Drop File | Browse

Description

About 60 characters left

| Individual Document Lookup | Upload |

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

| Cancel | Back | | Save | Send Referral | Send Referral and Continue |

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

You can "Save" the Referral to come back to it later, this is creating a draft.

Once you click "Send Referral" the referral will send 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 will be linked.

How to handle referrals in these cases

For referrals in this case, you can attempt to use a referral to communicate back and forth to the supportive service provider agency as to whether they accept the referral for housing support or a different supportive service. They will already have access to the member, their plan of care, etc. so you do not need to send a "Referral Packet". In this case, 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 make a decision 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

Log in to Therap accept referrals as the admin of the supportive service provider.

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

View when logged in as admin peer support

Select referrals sent to your agency marked as Pending Provider Response

Oversight Agency	1915i State Plan Amendment Oversight Account
Denial Reason	- Please Select - ▾

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

Cancel	Back		Update Referral	Accept	Deny

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	12/13/2024 📅
Notification Level	Medium
Recipient Provider	▬▬▬▬▬
Oversight Agency	1915i State Plan Amendment Oversight Account
Denial Reason	- Please Select - ▾

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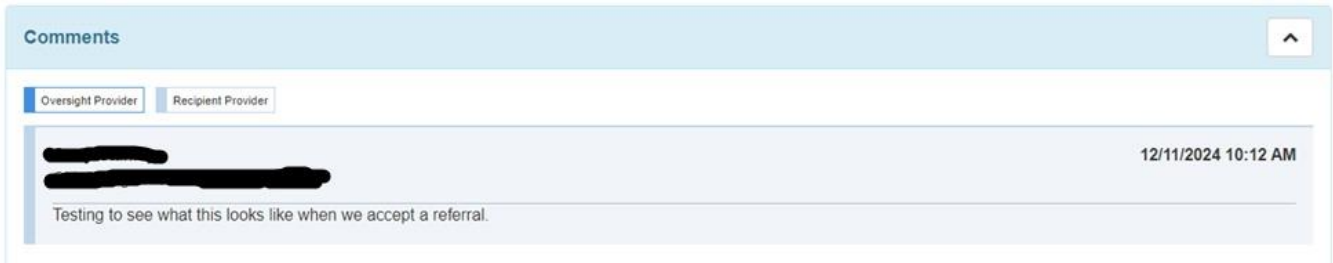
If you choose **Update Referral**, you will be able to send comments back to the referring provider such as suggesting a different admission date or giving/getting additional information before accepting or denying.

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

Oversight Care Coordination Accounts must then also accept the referral to finalize it.

After service provider accepts the referral it is sent back to the Oversight Agency for this to occur.

Acknowledgement List – Need to Acknowledge Referrals

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.

Therap creates a tracking record of these actions which serve to document provider actions and reflects inaction through a lack of acknowledgement.

Referral Accepted by Supportive Service Provider – sent back to Oversight Care Coordination Agency for final approval of referral

Referral Accepted by Linked Provider and Sent Back to Oversight Agency

[Back to Top]

1. 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.

2. 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

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 Den Dat
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

Accepted by Recipient Provider List

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	Admission Date	Closed Date	Discontinued Date	Time Zone
REF-SPAND-	Doe, John	(SPA-ND)	Medium	Accepted By Recipient Provider	Care Coordinator	12/18/2024		12/11/2024	12/11/2024	12/11/2024							US/Central

Showing 1 to 1 of 1 entry

. The referral form will now be in 'Accepted By Recipient Provider' status. Oversight users may accept, deny, update, or revert the Referral as necessary using the respective buttons at the bottom. The Referral is sent back to the Linked Provider with further details. The individual must be assigned with an <u>Oversight ID</u> for the Oversight Agency to accept the Referral. 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.

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

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	Isabella Johnson - Demographic Information.pdf (182.15 KB)	Isabella's Demographic Information	Mia Cole, Program Manager	03/28/2024 10:25 AM	PDF View | Remove
3. Attachment	Isabella Johnson - Insurance Information.pdf	Isabella's Insurance	Mia Cole, Program	03/28/2024 10:28	PDF View | Remove

| 4. Attachment 4 | Isabella Johnson - Immunization Information.pdf (182.11 KB) | Isabella's Immunization History | Mia Cole, Program Manager | 03/28/2024 10:32 AM | PDF View \| Remove |

Attach Other File

Comments ^

Oversight Provider   Recipient Provider

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

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

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

The referral request has been reviewed and accepted.

Add Comments

About 3000 characters left

Cancel   Back   Copy Form   Discontinue   Accept   Deny   Update Referral   Revert

4. 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

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5. 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.

Referrals require 2 acceptances – one from the supportive service provider and one from the care coordinator. Both need to occur to finalize the referral.

Closing the Referral

Individual Admitted by Linked Provider

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1. Users with the *Oversight Referral* caseload-based role can close Referrals in the 'Accepted by Recipient Provider' status by clicking on the **Admission Completed** link in the 'Referral' section of the Oversight Dashboard. Once the individual has been admitted by the Linked Provider, the count for the **Admission Completed** link increases by one.

2. 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

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. Oversight users can close the Referral using the Close button at the bottom.

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 |

15

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 ❶

General Information

|	
Individual	Isabella Johnson ❶
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

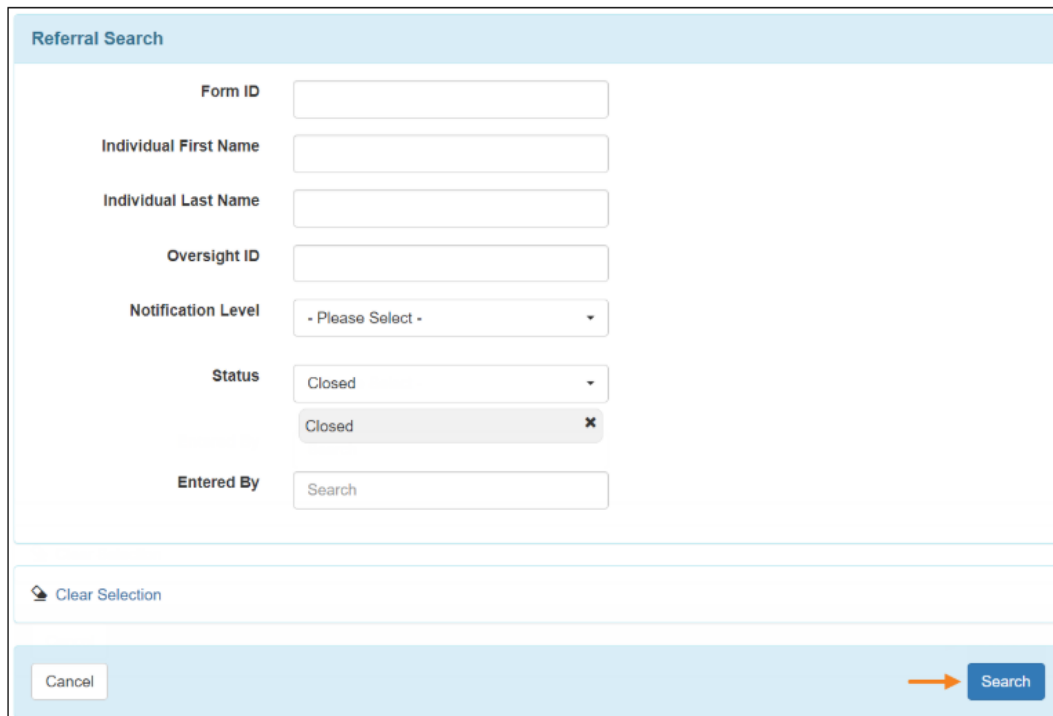**Therap**®   1915i
          FirstPage

Provider: 1915i State Plan Amendment Oversight   **Switch Provider**
          Account
Profile: External

Individual Demographics	**Individual Home Page**
Worklist	Individual List
Search	
Custom Fields	
Insurance	
Contact List	
Quick Referral	

Document Storage	**Referral**
Individual	New
New	Worklist
Search	Accepted by Recipient Provider
	Waiting List
	Admission Completed (1)
	Acknowledgement List
	Search
	Discontinue Referral

Searching Referrals

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

Referral
New
Worklist
Accepted by Recipient Provider
Waiting List
Admission Completed
Acknowledgement List
Search ⬅
Discontinue Referral
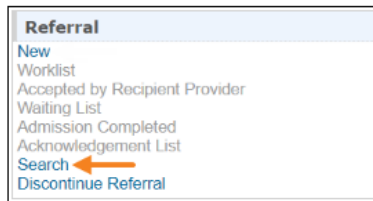
2. On the 'Referral Search' page, enter search parameters as appropriate and click on the **Search** button. You may also perform a blank search without entering any parameters which would show you Referrals of all status.

Referral Search

Form ID	
Individual First Name	
Individual Last Name	
Oversight ID	
Notification Level	- Please Select - ▾
Status	Closed ▾
	Closed ✕
Entered By	Search

🖋 Clear Selection

Cancel   ➜ Search

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

Referral Search

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	03/312024	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

Filter | 15 Records

Q 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. A new referral may then be sent to the member's next choice of supportive service provider.

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

Referral Search

Form ID	
Individual First Name	
Individual Last Name	
Oversight ID	
Notification Level	- Please Select - ▾
Status	- Please Select - ▾
Entered By	Search

🖋 Clear Selection

Cancel → Search

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

Referral Search

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-N5W3LTASVWVV4	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-N5W3KLEFLWVVH	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

Q New Search
x Export to Excel

Cancel   Back

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.

6. Users with the *Oversight Restricted Referral* 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.