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UCR - OPI Referral Waitlist

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

Add A Client

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

- Create New Person

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

Add a Referral

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

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

Add Service Request

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

- Service Request Tab
- ➕ Add Service Request

1. Request Date
   - ❌ Close All
   - Open the **Green** ➕ Expander next to "Case Management"
2. ✅ OPI Case Management (**ONLY**)

- Open the **Green** ➕ Expander
   1. Request Detail

2. Request Status: Waitlist

Add a Risk Assessment

Edit Program Referral Page:
- Referral Detail Tab
- Risk Assessment Tab
- ➕ Add New

1. Assessment Date:
2. Risk Score:

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

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The most recent Assessment Date will display at the top.

Step 2. Update the Service Request Date

- Update the Requested On date:

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

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Reviewing the Waitlist will reflect the latest Risk Assessment date.

Review Waitlist

- Search Tab
- Find Service Request

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

Export to Excel

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

Service Request Statuses

Approved Status

UCR will automatically convert the Service Request Status to "Approved" when the Turnaround Report is uploaded into UCR.

Denied Status

Use this Status if a Client does not qualified for OPI Services
  ● Select the Ref ID

  ● Service Requests Tab
  ● Open the **Green** ✚ Expander

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1. Request Detail Tab
2. Request Status: Denied

- Status Reason:
  - If "Other", narrate in the text box

Withdrawn Status

Use this Status if a Client decides not to join the OPI Program or has passed away.
- Select the Ref ID

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

1. Request Detail Tab
2. Request Status: Withdrawn

- ● Status Reason
  - ○ If "Other", narrate in the text box.

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

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