

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:

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

Add A Client

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

- Create New Person

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:

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 - RealD UCR 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:

Last Name	First Name	MI	Nickname	DOB	SSN	Prime #	Alt ID	Gender	OA Status	UCR Status	Primary	Duplicate
Doo	Scooby											

Add Person

Last Name: First Name: Date of Birth: Declined To State:
SSN: Prime #: Alternate ID:

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

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, 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
 - ~~X~~ Close All
 - Open the **Green +** Expander next to "Case Management"
2. OPI Case Management (**ONLY**)

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, 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
Showing 0 to 0 of 0 entries First Prev								

Add Service Request

1 Request Date: 08/03/2023 [📅](#)

Select all services this person is requesting:

~~X~~ Close All [📄](#) Open All

- Case Management
- OPI Case Management (36)
- In-Home Services
- Special Needs

Save Cancel

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

Revised 4/16/2024

2. Request Status: Waitlist

The screenshot shows the 'Edit Program Referral' page in the UCR system. At the top, there are logos for Multnomah County, UAT - RealD, and UCR. Below the logos is a navigation bar with various menu items. The main content area displays referral details for 'OPI Services', including 'Referral Status: Pending Service Request', 'Referral ID: 135491', and 'Person: DOO, SCOOBY'. A table of 'Service Requests' is shown, with one entry for '08/03/2023' with a status of 'Pending Authorization'. A 'Request Detail' tab is selected, showing 'Service Requested: OPI Case Management (36)' and 'Requested On: 08/03/2023'. A dropdown menu for 'Request Status' is open, showing options: 'Pending Authorization', 'Approved', 'Waitlist', 'Denied', and 'Withdrawn'. A red circle with the number '2' highlights the 'Waitlist' option. A red circle with the number '1' highlights the 'Request Detail' tab. A red arrow points to the 'Save' button.

Add a Risk Assessment

Edit Program Referral Page:

- Referral Detail Tab
- Risk Assessment Tab
- + Add New

The screenshot shows the 'Edit Program Referral' page in the UCR system, similar to the previous one. The 'Referral Detail' tab is selected. Below the referral details, there are tabs for 'Information', 'Risk Assessments', and 'Program Fees'. The 'Risk Assessments' tab is highlighted with a red arrow. Below the tabs, there is an 'Add New' button with a plus sign and a red arrow pointing to it. Below the button is a table with columns for 'Assessment Date', 'Risk Score', 'Entered By', and 'Agency'. The table currently shows '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.

Step 1. Update the Risk Assessment Score:

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

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: 01/15/2024

2 Risk Score: 11-17 = High Score

Save Cancel

Revised 4/16/2024

The most recent Assessment Date will display at the top.

Multnomah County **UAT - Trunk** **UCR**

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

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 157030 [Add/View Notes](#)
Person: [DOO_SCOOBY](#) DOB: 01/01/1950 Age: 74 Prime #/Alt ID: MC976IWE Client ID: 177153
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
01/15/2024	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

Multnomah County **UAT - Trunk** **UCR**

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

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 157030 [Add/View Notes](#)
Person: [DOO_SCOOBY](#) DOB: 01/01/1950 Age: 74 Prime #/Alt ID: MC976IWE Client ID: 177153
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 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					

Showing 1 to 1 of 1 entries First Prev

- Update the Requested On date:

Multnomah County UAT - Trunk **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: 157030 [Add/View Notes](#)
Person: **DOO, SCOOPY** DOB: 01/01/1950 Age: 74 Prime #/Alt ID: MC976IWE Client ID: 177153
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 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: 01/15/2024 Amount Requested:

Request Status: Waitlist

Effective On:

Save Cancel Remove

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

Multnomah County UAT - Trunk **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: 157030 [Add/View Notes](#)
Person: **DOO, SCOOPY** DOB: 01/01/1950 Age: 74 Prime #/Alt ID: MC976IWE Client ID: 177153
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 Filter:

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units	Frequency
01/15/2024	Waitlist	Not Sent	OPI Case Management					

Showing 1 to 1 of 1 entries First Prev

Revised 4/16/2024

Reviewing the Waitlist will reflect the latest Risk Assessment date.

UAT - Trunk

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: 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
157030	Doo, Scooby	OPI Services	OPI Case Management	FH - SAGE	Temporary Case Worker (DWA)	01/15/2024	Waitlist	11-17 = High Score	

Review Waitlist

- Search Tab
- Find Service Request

UAT - RealD

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

Find Person

Find Referral

Find MDT Referral

Find LTSS Referral

Find NMTP Referral

Find Family Caregiver Referrals

Find Service Request

Find Service Event

Find Non-Client Activity

Find Provider

Find User

Find Assessments Due

View LTSS Caseloads

First Name: [] Nickname/Alias: []

Prime #: [] Alt ID: []

Client ID: []

Filter: []

Name	MI	Nickname	DOB	SSN	Prime #	Alt ID	Gender	OA Status	UCR Status	Primary	Du
No person found.											

Revised 4/16/2024

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

The screenshot shows the 'Find Service Request' interface. The search filters are: Program: OPI Services, Service Group: Case Management, Service Category: OPI Case Management, Request Date: Start/End, Request Status: Waitlist, Assigned Agency: IMPACT-NW SE DC, Staff Member: Select One, Prime/Alt ID, and Referral ID. There are 'Search' and 'Clear' buttons. Below the filters is an 'Export To Excel' link and a table with 5 columns: Ref ID, Client Name, Program, Service, Assigned To, Staff, Request Date, Status, Status Rsn, and RAT Score. The table contains 5 rows of data. A purple arrow points to the 'Search' button.

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		1-5 = Low Score

Export to Excel

This screenshot is identical to the one above, but a purple arrow points to the 'Export To Excel' link above the table.

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

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	RATScore
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
126094	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

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

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: 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, 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
- 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 25 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 Previo

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: 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
08/03/2023	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: Waitlist
Pending Authorization
Approved
Waitlist
Denied
Withdrawn

Effective On:

Showing 1 to 1 of 1 entries First Previo

Revised 4/16/2024

- Status Reason:
 - 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_SCOOBY 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 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:
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 or has passed away.

- 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_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
- 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 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
08/03/2023	Waitlist	Not Sent	OPI Case Management					

Showing 1 to 1 of 1 entries First Prev

1. Request Detail Tab
2. Request Status: Withdrawn

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, 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
08/03/2023	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: 08/03/2023 Amount Requested:

2 Request Status:
 Effective On:
 Waitlist
 Pending Authorization
 Approved
 Waitlist
 Denied
 Withdrawn

Save Cancel

Showing 1 to 1 of 1 entries First Prev

- Status Reason
 - 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, 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 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, SCOOPY 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:

The image shows a software dialog box titled "Change Referral Status" with a close button (X) in the top right corner. The dialog contains three main input fields: "Closed On" with a date picker showing "08/04/2023", "Reason Closed" with a dropdown menu showing "Services Withdrawn/Denied", and "Comment:" with an empty text box. At the bottom, there are "Save" and "Cancel" buttons. Three purple circular callouts with numbers 1, 2, and 3 are overlaid on the "Closed On", "Reason Closed", and "Comment:" fields respectively. A purple arrow points to the "Save" button.