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Updating the Service Request Date Add Service Request Review Waitlist Export to Excel Approved Status Denied Status Withdrawn Status Closing a Referral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

Wulthomah 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	
Didn't find who you were looking for? <u>Create New Person</u>	
Show 25 • 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

Multhomah County UAT - RealD UCR Vour search returned no results	Logged ir
Search y Person Referral Administration y Contract Deliverables y Contract Payment Management y NMTP Transfer Caseloads Reports y 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	
Didn't find who you were looking for? <u>Create New Person</u>	
Show 25 v entries Filte	r:
	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	UAT - RealD		UCR					Logged in
Search 🛩 Person Refer	rral 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:	Pr	ime #:	Alt ID:					
Date of Birth:			Client ID:					
Search Clear								
Didn't find who you were	looking for? Create N	ew Person						
Show 25 🗸 entries					l. I	Filter:		
Last Name ^	First Name	rson						×
• 💶 Doo s	Scooby Last N	ame: Doo	First Name: So	cooby	Date of Birth: 01/0	01/1950	Declined To State: 🗌	
	Save	SSN: Cancel	Prime#:		Alternate ID:			

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: D00, SC00BY D0B: 01/01/1950 Age: 73										
Prime Number:	Alt ID: MCESOQR1 SSN	: Medicare #:								
Gender: Primary Lang	juage:									
OA Import Status: Not Imported										
UCR Client ID: 170625 MOW Client ID: GetCare ID:										
Demographics Contact Info Financi	al OAA Notes	Client Alerts Referrals	0							
Active Referrals O Closed 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	
Referral Received On: 07/03/2023 Source of Referral: Self (Client)	
4 5	
Assigned To: AHSC Staff Member: Case Worker, Temporary (ASL) >	
Save Cancel	

Add Service Request

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

- Service Request Tab
- 🕂 Add Service Request

Mu	ltnom ounty	ah <mark>U</mark>	AT - RealD	U	CR					
Search 👻	Person	Referral	Administration 👻	Contract Deliverables 👻	Contract Payment Management 👻	NMTP Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports	
Edit Progran	n Referra	al								
OPI Services Referral Status: Pending Service Request Referral ID: 135491 Image: Add/View Notes Person: DOD, SCOOPY DDB: 01/01/1950 Age: 73 Prime #/Alt ID: MCESOQR1 Client ID: 170625 Referral Date: 07/03/2023 Referral Source: Self (Client) Assigned To/Staff: AHSC: Temporary Case Worker (ASL)										
Referral I	Referral Detail Service Requests Notes Documents Service History Close Referral Referrals Image: Close Referral Add Service Request Image: Close Referral Referrals Image: Close Referral Image: Close Referra Image: Close Referral									
Show 25	✓ entrie	es	-					F	Filter:	
Requ	est Dat	e * Re	quest Status ^	GOP Sent ^ Servic	e ^ Provider ^ Request A	mount ^ Auth Amo	unt ^ Au	th Units ^	Frequency ^	
	No service request found.									
Showing 0	to 0 of	0 entries							First Prev	

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

Multnoma	h UA	T - RealD	U	CR				
Search 👻 Person A	Referral A	dministration 👻	Contract Deliverables 👻	Contract Payment Management 👻	NMTP Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports
Edit Program Referral								
OPI Services Person: L DA Referral Date: 07/03	<u>00, SCOOF</u> 3/2023	Referral St BY DOB: 01/01/ Referral So	atus: Pending Service R 1950 Age: 73 urce: Self (Client)	equest Referral ID: 13 Prime #/Alt ID: MC Assigned To/Staff: AH	5491 ESOQR1 Client ID: 1 SC: Temporary Case Work	lotes 170625 er (ASL)		
Referral Detail	Service R <u>est</u>	equests No	tes Documents	Service History Close Ref	erral Referrals 💶			
Show 25 v entries Request Date	* Requ	iest Status ^	GOP Sent * Servic	Add Service Request	3/2023		× ^	Filter: Frequency ^
Showing 0 to 0 of 0	entries		•	Select all services this per Close All Open All Case Management Case Management Case Management Services Special Needs	son is requesting: (36)			First Pre
			-	Save Cancel				

- Open the Green + Expander
 - 1. Request Detail

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2. Request Status: Waitlist

Mu	ltnom ounty	ah <mark>U</mark>	AT - Rea	ID	U	CR							
Search 👻	Person	Referral	Administration	o 👻 Con	tract Deliverables 👻	Contract	: Payment Mar	nagement 👻	NMTP T	ransfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports
Edit Program	n Referra	al											
OPI Serv Pers Referral Da	vices son: 💵 ate: 07/0	<u>DOO, SCC</u> 03/2023	Referra OOBY DOB: 01 Referra	Status: /01/1950 Source:	: Pending Service F) Age: 73 : Self (Client)	lequest	Refer Prime #/ Assigned To	ral ID: 135 Alt ID: MCI /Staff: AHS	5491 ESOQR1 SC: Temp	Client ID:	<u>Notes</u> 170625 ker (ASL)		
								0 0 0	. 1				
Referral L	Detail	Service	Requests	Notes	Documents	Service	History	Close Ref	erral	Referrals			
Show 25	vice Req	uest PS											Filter:
Requ	est Dat	e 🔭 Re	quest Statu	5 ^ GO	P Sent ^ Servi	ce ^ P	Provider ^	Request	Amour	nt ^ Auth Am	nount ^ A	uth Units ^	Frequency ^
	08/03/2	023 Pen Aut	ding norization	Not	Sent OPI Ca Manag	se ement							
Request	t Detail	Servi	ce Authorizat	ion S	Service Events	Status H	listory						
Service R	lequest	Detail											
Service I	Reques	ted: OPI	Case Manag	ement (3	36)								
2 Req	uested	On: 08/	03/2023		Amount Red	juested:							
Requ Save	Cancel	tus: Pe Pe An Wa	nding Authoriza nding Authoriza proved ittlist	tion 🗸									
Showint 1	to 1 of	1 entr Wit	hdrawn	_									First Previo

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 👻	LTSS Reports	NMTP Reports
Edit Program Referral						
OPI Services Referral Sta	atus: Pending Service Re	equest Referral ID: 135	491 Add/View N	lotes		
Person: 🚨 DOO, SCOOBY DOB: 01/01/	1950 Age: 73	Prime #/Alt ID: MCE	SOQR1 Client ID: 1	170625		
Referral Date: 07/03/2023 Referral Sou	urce: Self (Client)	Assigned To/Staff: AHS	C: Temporary Case Work	er (ASL)		
Referral Detail Service Requests No	tes 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	
Risk Score 6-10 = Moderate Score V	
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	UCR				
Search - Person Referral Administration - Co	ntract Deliverables 👻 Contract Paym	ent Management 👻 NMTR	P Transfer Caseloads	Reports 👻 LTSS Repor	ts NMTP Reports
Edit Program Referral					
OPI Services Referral Statu	s: Pending Service Request	Referral ID: 135491	Add/View N	<u>otes</u>	
Person: 🚨 DOO, SCOOBY DOB: 01/01/195	60 Age: 73 Pri	me #/Alt ID: MCESOQR	Client ID: 1	70625	
Referral Date: 07/03/2023 Referral Source	e: Self (Client) Assign	ed To/Staff: AHSC: Te	mporary Case Worke	er (ASL)	
Referral Detail Service Requests Notes	Documents Service Hist	Close Referral	Referrals 1		
Information Risk Assessments Program	m Fees				
G-Add New					
Assessment Date * Risk Score	Entered By ^	Agency ^			
No OPI Risk	Assessment(s) found				

- 1. Assessment Date
- 2. Risk Score



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The most recent Assessment Date will display at the top.

Multnomah	UAT - Trunk	UCF	2				
Search 🛩 Person Re	ferral Administration 🛩 Contra	ct Deliverables 🔻 Contract Payme	nt Management 👻 NMT	P Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports
Edit Program Referral							
OPI Services Person: Source Doc Referral Date: 08/01/2	Referral Status: F 2, SCOOBY DOB: 01/01/1950 A 2023 Referral Source:	Pending Service Request ge: 74 Prin Self (Client) Assign	Referral ID: 157030 ne #/Alt ID: MC976IV ed To/Staff: FH - SAG	E: Temporary Case V	<u>Notes</u> D: 177153 Norker (DWA	.)	
Referral Detail S	ervice Requests Notes	Documents Service Histo	ry Close Referral	Referrals			
Information Risk	k Assessments Program F	ees					
Add New							
Assessment Date	* Risk Score	Entered By ^	Agency ^				
01/15/2024	Risk Score : 11-17 = High Score	Fitzgerald, Michelle	DVSD-CS	Sk (
08/01/2023	Risk Score : 6-10 = Moderate Score	Fitzgerald, Michelle	DVSD-CS	•			

Step 2. Update the Service Request Date

-										
	Multn	omah ty	JAT - Trunl	¢	UCR					
	Search 👻 Per	son Referral	Administration 👒	Contract Deliverables 👻	Contract Payment Man	agement 👻	NMTP Transfer Caseloads	Reports 👻	LTSS Reports	NMTP Reports
	Edit Program Re	ferral								
	OPI Service	s	Referral S	tatus: Pending Service R	equest Refer	ral ID: 157	030 E Add/Vie	w Notes		
	Person:	L <u>DOO, SC</u>	OOBY DOB: 01/01	l/1950 Age: 74	Prime #//	Alt ID: MCS	76IWE Client	ID: 177153		
	Referral Date:	08/01/2023	Referral S	ource: Self (Client)	Assigned To,	Staff: FH	- SAGE: Temporary Case	Worker (DW	/A)	
	Referral Deta	il Servic	e Requests	lotes Documents	Service History	Close Refe	erral Referrals 💶			
	Add Service	Request								
	Show 25 🗸 e	ntries								Filter:
	Request	Date * Re	equest Status ^	GOP Sent ^ Servi	ce ^ Provider ^	Request	Amount ^ Auth An	nount ^ A	uth Units ^	Frequency ^
	08/0	01/2023 Wa	itlist	Not Sent OPI Ca Manage	se ement					
	Showing 1 to 1	1 of 1 entries	5							First Previo

• Update the Requested On date:

Multnomah County UAT - Trunk UCR										
Search v Person Referral Administration v Contract Deliverables v Contract Payment Management v NMTP Transfer Caseloads Reports v LTSS Reports NMTP	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										
CAdd Service Request										
Show 25 • entries										
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^ Freq	uency '									
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 Fffective On: Save_Cancel Remove										

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

Mu	ltnom ounty	ah <mark>U</mark>	AT - Trun	k	L	ICR						
Search 👻	Person	Referral	Administration	Contract Delive	rables 👻 Contra	act Payment Man	agement 👻	NMTP Transfe	r Caseloads	Reports 👻	LTSS Reports	NMTP Reports
Edit Program	Edit Program Referral											
OPI Serv Pers Referral Da	OPI Services Referral Status: Pending Service Request Referral ID: 157030 Add/View Notes Person: DO0, 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	lotes Docum	nents Servi	ce History	Close Refe	erral Refe	errals 🔳			
Add Ser	vice Req	uest										
Show 25	• entrie	s										Filter:
Requ	est Dat	e * Re	quest Status '	GOP Sent ^	Service ^	Provider ^	Request	Amount ^	Auth Am	ount ^ A	uth Units ^	Frequency '
٢	01/15/20	024 Wait	tlist	Not Sent	OPI Case Management							
Showing 1	to 1 of :	1 entries										First Previo

Reviewing the Waitlist will reflect the latest Risk Assessment date.

	Multr Cour	nomal nty	י ט	IAT - T	[runk			UCI	R							
Searc	h ≠ Pe	rson R	eferral	Administ	ration 👻 C	Contract Deliv	verables 👻	Contract Payme	ent Management	✓ NMTP Trans	fer Caseload	s Reports 🛩	LTSS Reports	NMTP Reports	;	
Find Ser	vice Re	quest														
Requ Requ Assign Pri Search	Progr quest D lest Sta led Ager ime/Alt	am: O ate: S tus: V ncy: Se : ID: ear	PI Servii tart /aitlist elect On	e	Enc ↓ ↓	✓ Serv d Sta R	vice Group	p: Case Manage	ment • Servio	e Category: [GOP Sent: [OPI Case Ma Ali ✓	nagement 🗸				
Export To	Excel															
Show 2	5 🗸 en	tries														
Ref ID	^	Client	Name	• ^	Program	^ Servic	e ^	Assigned To ′	Staff		^ Reque	st Date ^	Status ^	Status Rsn	^ RAT Score	^
<u>157030</u>		<u>Doo, S</u>	<u>ooby</u>		OPI Service	es OPI Cas Manage	e F ment F	H - SAGE	Temporary Ca	se Worker (DW	(A) (1/15/2024 V	Vaitlist	2	11-17 = High S	Score

Review Waitlist

- Search Tab
- Find Service Request

Multnomah UA County	AT - RealD	U	CR			
Search 🗸 Person Referral 🖉	Administration 👻	Contract Deliverables 👻	Contract Payment Management 👻	NMTP Transfer Caseloads	Reports 👻 LTS	S Reports NMTP Reports
Find Person						
Find Referral						
Find MDT Referral	First I	Name:	Nickname/Alias:			
Find LTSS Referral	Pri	me #:	Alt ID:			
Find NMTP Referral	0		Client ID:			
Find Family Caregiver Referrals						
Find Service Request						
S Find Service Event						Filter:
Find Non-Client Activity						Mark Dup
Find Provider	Name * MI *	Nickname ^ DOB	SSN Prime # Alt II	O ^ Gender ^ OA St	atus ^ UCR S	tatus ^ Primary D
Plad Harr			No person found.			
rina User						
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:

Multnomah County UAT - RealD	UCI	2		
Search - Person Referral Administration - Co	ntract Deliverables 👻 Contract Paymo	ent Management 👻 NMTP Transfer	Caseloads Reports - LTSS Reports	NMTP Reports
Find Service Request	0	3		
Program: OPI Services	Service Group: Case Manage	ment Service Categor	y: OPI Case Management 🗸	
A Request Date: Start End		GOP Ser	it: All 🗸	
Request Status: Waitlist				
Olssigned Agency: IMPACT-NW SE DC	Staff Member: Select One	v		
Prime/Alt ID:	Referral ID:			
Search Clear				
Export To Excel				
Show 25 V entries				
Ref ID * Client Name * Program	Service ^ Assigned To ^	Staff ^	Request Date ^ Status ^	Status Rsn * RAT Score *
126008 I OPI Services	OPI Case IMPACT-NW SE Management DC	Temporary Case Worker	06/13/2023 Waitlist	1-5 = Low Score
130612 DPI Services	OPI Case IMPACT-NW SE Management DC		03/28/2023 Waitlist	1-5 = Low Score
126007 DPI Services	OPI Case IMPACT-NW SE Management DC		05/31/2023 Waitlist	1-5 = Low Score
127020 DPI Services	OPI Case IMPACT-NW SE Management DC	Temporary Case Worker	05/25/2023 Waitlist	1-5 = Low Score
125994 OPI Services	OPI Case IMPACT-NW SE Management DC	Temporary Case Worker	03/09/2022 Waitlist	
Showing 1 to 25 of 40 entries				

Export to Excel

Mul	ltnomah unty	UAT -	RealD		UCF	2				
Search 👻	Person Ref	erral Admini	stration 👻 Cont	ract Deliverables	 Contract Payme 	nt Management 👻 NMTP Tr	ansfer Caseloads Report	s 👻 LTSS Reports	NMTP Reports	
Find Service	ind Service Request									
Pro Request Request S	Program: OPI Services Service Group: Case Management Service Category: OPI Case Management Request Date: Start Image: Case Management GOP Sent: All Request Status: Validist Validist Validist									
Prime/	Alt ID:	ACT-INVISE DO		Referral 1	ID:					
Search	Clear									
Export To Exce										
Show 25 🗸	er, ries									
Ref ID ^	Client N	lame '	Program ^	Service ^	Assigned To ^	Staff	^ Request Date	^ Status ^	Status Rsn ^	RAT Score ^
<u>126008</u>			OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	06/13/202	3 Waitlist		1-5 = Low Score
130612			OPI Services	OPI Case Management	IMPACT-NW SE DC		03/28/202	3 Waitlist		1-5 = Low Score
126007			OPI Services	OPI Case Management	IMPACT-NW SE DC		05/31/202	3 Waitlist		1-5 = Low Score
127020			OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	05/25/202	3 Waitlist		1-5 = Low Score
125994			OPI Services	OPI Case Management	IMPACT-NW SE	Temporary Case Worker	03/09/202	2 Waitlist		
Showing 1 to	25 of 40 ent	tries								

- 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 Form	2 Data	Review View	v Help	Acrohet	Q Tell me what	you want to do									
Get Data •	From From From Text/CSV Web R Get & Trai	m Table/ Recent Existir lange Sources Connect nsform Data	ions	Queries & Conr Properties Edit Links es & Connectior	ections	2↓ <u>X 2</u> K↓ Sort I	Filter	Text to Columns	Flash Remove Fill Duplicates	Data Validation - Data 1	Consolidate Relationsh	ips Manage Data Model	What-If F Analysis * Foreca	orecast Grou Sheet v	Ungroup Subtota	*ਭ Show Deta "∃ Hide Detai	il I
A1	• • • ×	✓ f _N Program	n_Referral_ID														
	А	вс	D	E	F	G		н	1			к	L L	м	N		o 🗨
1 PI	ogram Referral 👻	Client - First Nan-	Last Narr - Prin	ne Numb -	Alternate	✓ Program	Nan 👻	Service	 Assigned 	To 🔻	Staff Name	Request Da	Stati -	Status Reaso	 Status Reaso 	n Oth -	RATScore
2	125980	15848				OPI Servi	ices OPI Cas	e Managemer	t IMPACT-NW	SE DC Ter	mporary Case Worker	4/20/202	z aitlist			6-10	= woderate score
3	125994	151023				OPI Servi	ices OPI Cas	a Managemer	t IMPACT-NW	SE DC Ter	mporary Case Worker	3/9/202	2 W. tlist				
4	125868	72882				OPI Servi	ices OPI Cas	e Managemer	t IMPACT-NW	SE DC Ter	mporary Case Worker	10/6/202	2 Waitlist			1-5 =	= Low Score
6	125941	159151				OPI Servi	ices OPI Cas	e Managemer	t IMPACT-NW	SE DC Ter	mporary Case Worker	11/30/202	2 Waitlist			1-5 -	= Low Score
7	125857	168354				OPI Servi	ices OPI Cas	a Managemer	t IMPACT-NW	SE DC Ter	mporary Case Worker	11/1/202	2 Waitlist				-
8	127011	112				OPI Servi	ices OPI Cas	e Managemer	t IMPACT-NW	SE DC Ter	mporary Case Worker	10/31/202	2 Waitlist			1-5 =	= Low Score
9	126004	10523				OPI Servi	ices OPI Cas	e Managemer	t IMPACT-NW	SE DC Ter	mporary Case Worker	5/24/202	3 Waitlist			1-5 =	= Low Score
10	127020	39342				OPI Servi	ices OPI Cas	e Managemer	t IMPACT-NW	SE DC Ter	mporary Case Worker	5/25/202	3 Waitlist			1-5 =	= Low Score
12	127644	41949				OPI Servi	ices OPI Cas	e Managemen	t IMPACT-NW	SE DC Ter	mporary Case Worker	1/20/202	3 Waitlist			1-5 =	= Low Score
13	127642	49718				OPI Servi	ices OPI Cas	e Managemen	t IMPACT-NW	SE DC Ter	mporary Case Worker	12/22/202	2 Waitlist			1-5 =	= Low Score
14	127014	150957				OPI Servi	ices OPI Cas	o Managomor	+ IMPACT-NW	SE DC Ter	mporany Case Worker	1/5/202	3 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

Mu	Multnomah UAT - RealD UCR										
Search 👻	Person	Referral	Administration 👻	Contract Deliverables	✓ Contract Pay	yment Management 👻	NMTP Transfer Caseload	s Reports 🛩	LTSS Reports	NMTP Reports	
Find Service	ind Service Request										
Pr Request Assigned A Prime/ Search	Program: OPI Services Request Date: Start End GOP Sent: Assigned Agency: AHSC Prime/Alt ID: Referral ID:										
Export To Exc	<u>el</u>										
Show 25 🗸	entries										
Ref ID ^	Clie	ent Name	 Program 	^ Service ^ A	ssigned To ^	Staff	^ Request Date ^	Status ^	Status Rsn	A RAT Score	
135491	⊥ <u>Doo</u> ,	<u>Scooby</u>	OPI Servic	es OPI Case Al Management Al	HSC	Temporary Case Worker (ASL)	08/03/2023	Waitlist		6-10 = Moderate Score	
4											
Showing 1 to	Showing 1 to 1 of 1 entries										

- Service Requests Tab
- Open the Green + Expander

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Multnomah County 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: 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)	
Pafarral Datail Service Requests Notas Documents Service History Close Referral Referrals	
GAdd Service Request	
Show 25 • entries	Filter:
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^	Frequency ^
OPI Case 08/03/2023 Waitlist Not Sent Management	
Showing 1 to 1 of 1 entries	First Previo

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

_						
Multnomah County	UAT - RealD	U	CR			
Search 🛩 Person Ref	ferral Administration 🛩	Contract Deliverables 👻	Contract Payment Management 👻	NMTP Transfer Caseloads	Reports 👻 LTSS Reports	NMTP Reports
Edit Program Referral						
OPI Services	Referral St	atus: Pending Service R	equest Referral ID: 135	491 🗩 Add/View N	lotes	
Person: 🚨 DOO	, SCOOBY DOB: 01/01/	1950 Age: 73	Prime #/Alt ID: MC	ESOQR1 Client ID: 1	170625	
Referral Date: 07/03/2	023 Referral So	urce: Self (Client)	Assigned To/Staff: AHS	SC: Temporary Case Work	er (ASL)	
					· ·	
Referral Detail Se	ervice Requests No	tes Documents	Service History Close Ref	erral Referrals 🛄		
Add Service Request	t					
Show 25 🗸 entries						Filter:
Request Date *	Request Status ^	GOP Sent ^ Servio	ce ^ Provider ^ Request	Amount ^ Auth Am	ount ^ Auth Units ^	Frequency ^
08/03/2023	Waitlist	Not Sent OPI Ca Manage	se ement			
Request Detail	Service Authorization	Service Events	Status History			
Service Request Det	tail					
Service Requested:	OPI Case Manageme	ent (36)				
Requested On:	. 08/03/2023	Amount Req	juested:			
Request Status:	Waitlist	~				
Effective On:	Pending Authorization Approved					
Save	Waitlist Denied Withdrawn					
Showing 1 to 1 of 1 er	ntries					First Previo

Status Reason:

• If "Other", narrate in the text box

County UAT - RealD UCR	
Search 🗸 Person Referral Administration 🗸 Contract Deliverables 🗸 Contract Payment Management 🖌 NMTP Transfer Caseloads Reports 🗸 LTSS Reports NMTP F	leports
Edit Program Referral	
OPI Services Referral Status: Pending Service Request Referral ID: 135491 Add/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	
Show 25 v entries Filter:	
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^ Frequest Amount ^ Auth Amount ^ Auth Units ^ Frequest Status	iency 1
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 III Amount Requested:	
Request Status: Denied 🗸	
Effective On:	
Status Reason: Select One If Other, Select One Explain: Financial need not established Not a Multoo Resident Paid by Medicaid/Other Other Other	

Withdrawn Status

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

• Select the Ref ID

Multnomah County UAT - RealD UCR								
Search 🛩 Person Referral Administ	tration 👻 Contract Deliverables 👻	Contract Payment Management 👒	NMTP Transfer Caseloads Repo	orts 👻 LTSS Reports 🕴	MTP 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 Prime/Alt ID: Referral ID:								
Export To Excel								
Show 25 🗸 entries								
Ref ID * Client Name * F	Program ^ Service ^ Assi	igned To ^ Staff	A Request Date A Status	Status Rsn ^	RAT Score			
135491 Doo, Scooby O	OPI Services OPI Case AHSC Management AHSC	C Temporary Case Worker (ASL)	08/03/2023 Waitlist	t	6-10 = Moderate Score			
Showing 1 to 1 of 1 entries								

- Service Requests Tab
- Open the Green + Expander

UCR - OPI Referral Waitlist

Multnomah UAT - RealD UCR	
Search v Person Referral Administration v Contract Deliverables v Contract Payment Management v NMTP Transfer Caseloads Reports v LTSS Reports	NMTP Reports
Edit Program Referral	
OPI Services Referral Status: Pending Service Request Referral ID: 135491 Image: Add/View Notes Person: Image: Dool, 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	
Show 25 🗸 entries	Filter:
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^	Frequency ^
OPI Case 08/03/2023 Waitlist Not Sent Management	
Showing 1 to 1 of 1 entries	First Previo

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

Mul	tnomah unty	UAT - I	RealD	U	CR					
Search 👻	Person Ref	ferral Administ	ration 👻 Co	ontract Deliverables 👻	Contract Payment M	anagement 👻	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: 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 D	etail S	ervice Request	ts Notes	5 Documents	Service History	Close Refe	rral Referrals 1			
Show 25 v entries Filter:										
OB/03/2023 Waitlist Not Sent OPI Case Management OPI Case										
Request	Detail	Service Autho	rization	Service Events	Status History					
Service R	equested	: OPI Case Ma	anagement	(36)						
2 Reque Reque Eff Save	ested On est Status ective On Cancel	: 08/03/2023 : Waitlist Pending Auth Approved Waitlist Denied Withdrawn	norization	Amount Req	uested:					
Showing 1	to of 1 er	ntries								First Previo

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

Search > Person Referral Administration > Contract Deliverables > Contract Payment Management > NMTP Transfer Caseloads Reports > LTSS Reports NMTP Report Edit Program Referral
Edit Program Referral OPI Services Referral Status: Active Referral ID: 135491 PAdd/View Notes Dept. 2016/01/02/02 Dept. 2016/01/02/02/02 Dept. 2016/01/02/02/02 Dept. 2016/01/02/02/02 Dept. 2016/01/02/02/02/02/02/02/02/02/02/02/02/02/02/
OPI Services Referral Status: Active Referral ID: 135491 PAdd/View Notes
Person: DOO_SCOOBY DOB: 01/01/1950 Age: 73 Prime #/AITID: MCESUQRI Client ID: 17/0525 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
GAdd Service Request
Show 25 • entries Filter:
Request Date * Request Status ^ GOP Sent ^ Service ^ Provider ^ Request Amount ^ Auth Amount ^ Auth Units ^ Frequency
OPI Case Management 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 Client Deceased Oss of Contact Other Remove

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 - RealD	l i i	UCR					
Search 🛩 Person Re	ferral Administration 🛩	Contract Deliverables 🤝	Contract Payment Manageme	ent 👻 NMTP Transfer Ca	seloads Reports 🛩	LTSS Reports	NMTP Reports	
Edit Program Referral								
OPI Services Person: L DOC Referral Date: 08/01/2	Referral State <u>), SCOO</u> 2023 Referral Source	us: Active 50 Age: 74 Pri ce: Self (Client) Assign	Referral ID: 139645 me #/Alt ID: MCKIXTED ned To/Staff: FH - SAGE: T	Add/View Notes Client ID: 172	049 (DWA)			
			1					
Referral Detail S	ervice Requests No	tes Documents	Service History Clos	e Referral Referra	ls 💶			
2 ferral Status Char	ge History		Referral opened on 1/4/2	024 by				
Change Referral Status								
Show 10 • entries Filter:								
Status	^ Stat	us Changed On ^ R	teason ^	Comment ^	Status Changed	Ву	^ Modified	d On ^
Active		Re	equest Created				01/04	4/2024

UCR - OPI Referral Waitlist

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

	Change Referral Status		×
2	Closed On 08/04/2023		
4	Posson Closed Services Withdr	rawn/Denied 🗸	
	3 Comment:		
	Save Cancel		00/04