

UCR - Closing a Referral

Closing all the Active Referrals for a client will inactivate them in UCR. A client is never completely closed until their Date of Death is entered into UCR or transferred from Oregon Access.

Find Person Search

- Enter Last Name/First Name
- Search
 - Select the Name of Client

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	Mark Duplicates	Duplicate
					06/12/1951	5415			Man/Boy	Inactive	Active	<input type="checkbox"/>	64269	<input type="checkbox"/>

1. Select the Referrals Tab
2. Select the Referral ID Link to the referral you want to close

Edit Person

Name: DOB: 06/12/1951 Age: 72
Prime Number: Alt ID: SSN: xxx-xx-5415 Medicare #:
Gender: Man/Boy Primary Language: English

Other System Information
OA Import Status: Inactive Last OA Update: 06/12/2020 OA Person ID:
UCR Client ID: MOW Client ID: GetCare ID:

Demographics Contact Info Financial OAA Notes Client Alerts **Referrals**

Active Referrals **Closed Referrals** Request History

List of active referrals only. See history tabs for list of all referrals/services.

[Add New Referral](#)

Show entries

Referral ID	Program	Status	Referred On	Assigned To/Staff
42143	Case Management	Active	03/31/2019	URBAN LEAGUE PDX: <input type="text"/>

Showing 1 to 1 of 1 entries

Select the Service Requests Tab

1. Select the **+** for the Requests with an “Approved” Request Status
 - If there are no Service Requests in an “Approved” Request Status, skip to Close Referral Tab

Edit Program Referral

Case Management Referral Status: Active Referral ID: 42143 Add/View Notes 12/15/2023-

Person: [Redacted] DOB: 06/12/1951 Age: 72 Prime #/Alt ID: [Redacted] Client ID: [Redacted]

Referral Date: 03/31/2019 Referral Source: Self Assigned To/Staff: URBAN LEAGUE PDX: [Redacted]

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals 8

Add Service Request

Show 25 entries Filter: [Redacted]

Request Date	Request Status	Service	Provider	Auth Amount	Auth Units	Frequency
03/31/2019	Approved	OAA Case Management	Urban League of Portland			Per Month

Showing 1 to 1 of 1 entries First Previous 1 Next Last

Request Detail Tab

1. Request Status: From the Drop Down Menu - Change to “Request Closed”
 - a. If you don't see a “Request Closed” option from the Drop Down Menu, fill out the [UCR Request Form](#). The Multnomah County data team will close the referral for you.
 - b. Change all Service Requests with an “Approved” Request Status to Request Closed within the referral.

Edit Program Referral

Case Management Referral Status: Active Referral ID: [Redacted] Add/View Notes 12/15/2023-

Person: [Redacted] DOB: 06/12/1951 Age: 72 Prime #/Alt ID: [Redacted] Client ID: [Redacted]

Referral Date: 03/31/2019 Referral Source: Self Assigned To/Staff: URBAN LEAGUE PDX: [Redacted]

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals 8

Add Service Request

Show 25 entries Filter: [Redacted]

Request Date	Request Status	Service	Provider	Auth Amount	Auth Units	Frequency
03/31/2019	Approved	OAA Case Management	Urban League of Portland			Per Month

Request Detail Service Authorization Service Events Status History

Service Request Detail

Service Requested: OAA Case Management (35)

Requested On: 03/31/2019

Request Status: Approved

Save Cancel

Showing 1 to 1 of 1 entries First Previous 1 Next Last

Close Referral Tab

1. Select the “Change Referral Status”

The screenshot shows the 'Edit Program Referral' interface. At the top, there is a 'Case Management' section with fields for 'Referral Status: Active', 'Referral ID', 'Person', 'DOB: 06/12/1951', 'Age: 72', 'Prime #/Alt ID', and 'Client ID'. Below this, there are tabs for 'Referral Detail', 'Service Requests', 'Notes', 'Documents', 'Service History', 'Close Referral', and 'Referrals'. The 'Close Referral' tab is highlighted with a red box and a red circle with the number '1'. Below the tabs, there is a 'Referral Status Change History' section with a table showing one entry: 'Active' status changed on '04/09/2019' with the reason 'Request Created'.

1. Enter the “Closed On” date
2. Reason Closed
3. Any Comments

The screenshot shows the 'Change Referral Status' dialog box. It has three main input fields: 'Closed On' with the date '01/01/2024' (marked with a red circle '1'), 'Reason Closed' with the dropdown menu set to 'Services Complete' (marked with a red circle '2'), and 'Comment' (marked with a red circle '3'). At the bottom, there are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.