

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:

											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

Multnomah County UAT - RealID UCR

Search Person Referral 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: Prime #: Date of Birth: Alt ID: Client ID:

Search Clear

Didn't find who you were looking for? [Create New Person](#)

Show 25 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 - RealID UCR

Search Person Referral 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: Prime #: Date of Birth: Alt ID: Client ID:

Search Clear

Didn't find who you were looking for? [Create New Person](#)

Show 25 entries Filter:

Add Person

Last Name: Doo First Name: Scooby Date of Birth: 01/01/1950 Declined To State: SSN: Prime #: Alt ID:

Save Cancel

Add a Referral

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

UAT - RealID **UCR**

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

Edit Person

Name: DOO, SCOOPY **DOB:** 01/01/1950 **Age:** 73
Prime Number: **Alt ID:** MCES0QR1 **SSN:** **Medicare #:**
Gender: **Primary Language:**

Other System Information
OA Import Status: Not Imported
UCR Client ID: 170625 **MOW Client ID:** **GetCare ID:**

Demographics Contact Info Financial OAA Notes Client Alerts **Referrals** 0

Active Referrals 0 **Closed Referrals** 0 **Request History**

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

+ Add New Referral

Show 25 ▾ entries

Referral ID	Program	Status	Referred On	Assigned To/Staff
No referrals 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

1 **Program:** OPI Services

2 **Referral Received On:** 07/03/2023

3 **Source of Referral:** Self (Client)

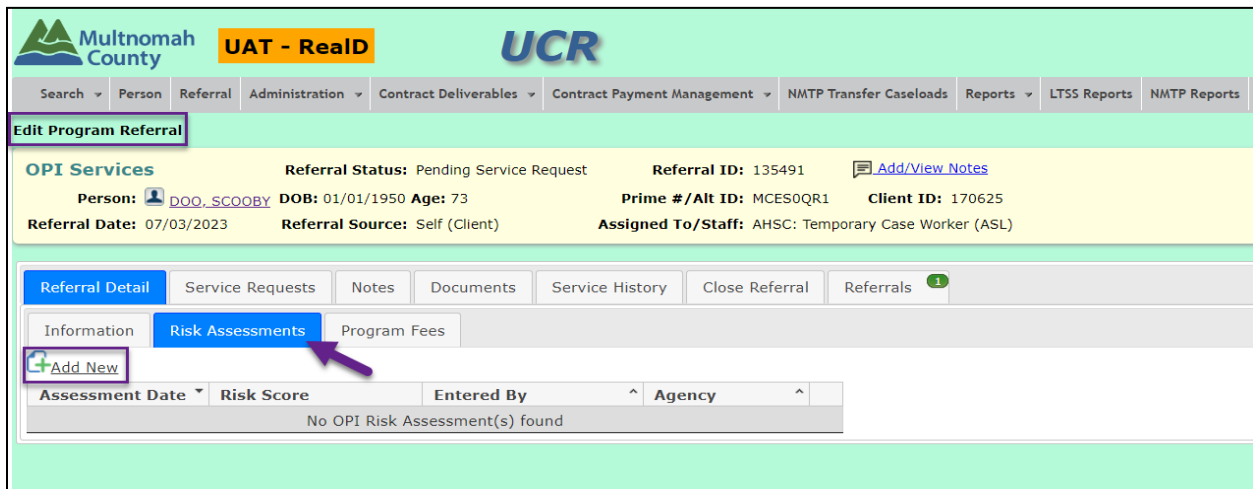
4 **Assigned To:** AHSC

5 **Staff Member:** Case Worker, Temporary (ASL)

Save **Cancel**

Add a Risk Assessment

- Edit Program Referral Page
- Referral Detail Tab
- Risk Assessment Tab
- **+** Add New



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

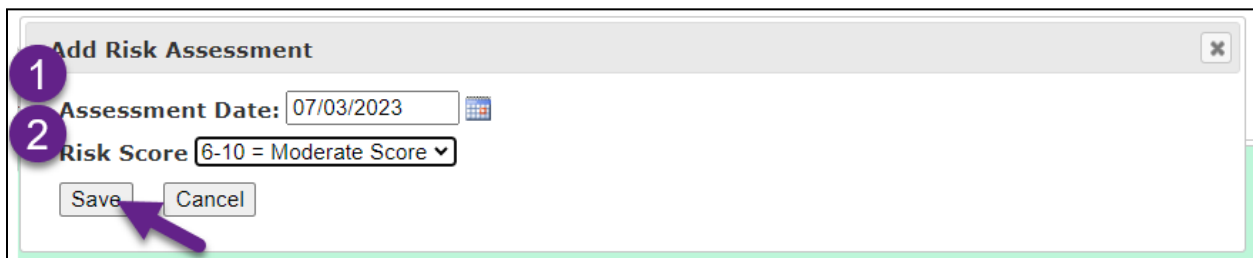
Information **Risk Assessments** Program Fees

+ 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:** 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:

1. Assessment Date
2. Risk Score

Add Risk Assessment

1 **Assessment Date:** 09/01/2023

2 **Risk Score** 6-10 = Moderate Score

Save Cancel

The most recent Assessment Date will display at the top.

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 136413 Add/View Notes

Person: DOO, SCOOPY DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949

Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

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
09/01/2023	Risk Score : 6-10 = Moderate Score	Fitzgerald, Michelle	ADVSD-CS
08/01/2023	Risk Score : 1-5 = Low Score	Fitzgerald, Michelle	ADVSD-CS

Step 2. Update the Service Request Date

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 136413 Add/View Notes

Person: DOO, SCOOPY DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949

Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

Referral Detail Service Requests Notes Documents Service History Close Referral Referrals 1

Add Service Request

Show 25 entries

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units
08/01/2023	Waitlist	Not Sent	OPI Case Management				

Showing 1 to 1 of 1 entries

Revised 10/17/2023

- Update the Requested On date:

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 136413 [Add/View Notes](#)

Person: [DOO, SCOOBY](#) DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949

Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

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: 09/01/2023 Amount Requested:

Request Status: Waitlist

Effective On:

Save Cancel Remove

Showing 1 to 1 of 1 entries First

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

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 136413 [Add/View Notes](#)

Person: [DOO, SCOOBY](#) DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949

Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

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	Paid Amount
09/01/2023	Waitlist	Not Sent	OPI Case Management						

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

Reviewing the Waitlist will reflect the latest Risk Assessment date.

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
136413	Doo, Scooby	OPI Services	OPI Case Management	FRIENDLY-HSE-WEST DC	Temporary Case Worker	09/01/2023	Waitlist		6-10 = Moderate Score

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
Showing 0 to 0 of 0 entries			

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**

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- Open the **Green +** Expander
 1. Request Detail
 2. Request Status: Waitlist

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: **DOD, 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
08/03/2023	Pending Authorization	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:

Request Status: Pending Authorization

Save Cancel **Waitlist** Approved Denied Withdrawn

Showing 1 to 1 of 1 entries First Previous

Review Waitlist

- Search Tab
- Find Service Request

Multnomah County **UAT - RealD** **UCR**

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	Duplicate
No person found.											

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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: IMPACT-NW SE DC

Multnomah County **UAT - RealID** **UCR**

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

Find Service Request

1 **Program:** OPI Services 2 **Service Group:** Case Management 3 **Service Category:** OPI Case Management

4 **Request Date:** Start End **Request Status:** Waitlist **GOP Sent:** All

5 **Assigned Agency:** IMPACT-NW SE DC **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
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		

Showing 1 to 25 of 40 entries

Export to Excel

Multnomah County **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 **Request Status:** Waitlist **GOP Sent:** All

Assigned Agency: IMPACT-NW SE DC **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
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		

Showing 1 to 25 of 40 entries

Revised 10/17/2023

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

Program_Referral_ID	Client	First Name	Last Name	Prime Number	Alternate	Program Name	Service	Assigned To	Staff Name	Request Date	Status	Status Reason	Status Reason Other	RAT Score
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
126004	10523					OPI Services	OPI Case Management	IMPACT-NW SE DC	Temporary Case Worker	3/24/2023	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
127544	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

Approved Status

Use this Status to transition a Client from the Waitlist to an **active** OPI Services Client.

- Select the Ref ID

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
136413	Doq. Scooby	OPI Services	OPI Case Management	FRIENDLY-HSE-WEST DC	Temporary Case Worker	09/01/2023	Waitlist		6-10 = Moderate Score

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

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 136413 Add/View Notes

Person: DOQ. SCOOPY DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949

Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

Referral Detail **Service Requests** Notes Documents Service History Close Referral Referrals 1

Add Service Request

Show 25 entries

Request Date	Request Status	GOP Sent	Service	Provider	Request Amount	Auth Amount	Auth Units
09/01/2023	Waitlist	Not Sent	OPI Case Management				

Showing 1 to 1 of 1 entries

Revised 10/17/2023

1. Request Detail Tab
2. Request Status: Approved

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 136413 [Add/View Notes](#)
Person: **DOO, SCOOBY** DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949
Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

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
09/01/2023	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: Amount Requested:

2 Request Status: Approved Pending Authorization Approved Waitlist Denied Withdrawn

Effective On:

Showing 1 of 1 entries First Previous

1. Service Authorization Tab
2. Authorized From Date: add the "Approved" date

Edit Program Referral

OPI Services Referral Status: Active Referral ID: 136413 [Add/View Notes](#)
Person: **DOO, SCOOBY** DOB: 01/01/1960 Age: 63 Prime #/Alt ID: MC302JWQ Client ID: 170949
Referral Date: 08/01/2023 Referral Source: Self (Client) Assigned To/Staff: FRIENDLY-HSE-WEST DC: Temporary Case Worker

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
09/01/2023	Approved	Not Sent	OPI Case Management					

Request Detail **Service Authorization** Service Events Status History

☐ GOP Sent

2 Authorized From: Authorized To:

No Provider selected [Select Provider](#)

Authorized Units:

Last Modified By: michellef Modified On: 9/22/2023 4:24:38 PM

Showing 1 to 1 of 1 entries First Previous

Denied Status

Use this Status if a Client is no longer qualified for OPI Services

- Select the Ref ID

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

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
	08/03/2023	Waitlist	Not Sent	OPI Case Management					

Showing 1 to 1 of 1 entries First Prev

Revised 10/17/2023

1. Request Detail Tab
2. Request Status: Denied

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

[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: 08/03/2023 Amount Requested:

Request Status: **Waitlist**
Effective On:
Save Cancel

Showing 1 to 1 of 1 entries First Previous

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

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

[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: **Select One**
If Other, Explain:
Save Cancel

Showing 1 to 1 of 1 entries First Previous

Withdrawn Status

Use this Status if a Client decides not to join the OPI Program

- Select the Ref ID

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	Doog, 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

Edit Program Referral

OPI Services Referral Status: Pending Service Request Referral ID: 135491 [Add/View Notes](#)

Person: DOOG, 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 ^
	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 - 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 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:

Effective On:

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, 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 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: Amount Requested:

Request Status:

Effective On:

Status Reason:

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

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, 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

Referral Status Change History Referral opened on 8/2/2023 by Michelle Fitzgerald

[Change Referral Status](#)

Show 10 entries Filter:

Status	Status Changed On	Reason	Comment	Status Changed By	Modified On
Active		Request Created		michellef	08/04/2023

1. Closed On:
2. Reason Closed: [Services Withdrawn/Denied](#)
3. Comment:

Change Referral Status

1 Closed On 08/04/2023

2 Reason Closed [Services Withdrawn/Denied](#)

3 Comment:

Save Cancel