

Guidance ECRS 2013-3

New Registration Process within the Electronic Case Record System (Therap)

DDDS Oversight Account

Effective **November 19, 2013**

(revised 01/02/2014)

All new clients must be created in Therap using the following process to allow for proper flow and linkage of information for each individual. Individuals will no longer be created by each individual provider agency. The individual will need to be initially created in the Oversight Account, the individual will then be “Referred” to each provider agency. By using this process, the individual’s records generated by each provider agency will be linked together, thus placing us in a much better position to populate an individual record and transfer data (regardless of the vendor selected).

Once an individual selects a provider for a service, a referral will be made to that provider. The provider will then be able to open the individual through the Therap Admission Process within their associated agency. The remainder of the record completion process within the service provider agency will remain the same as it current exists (for example assigning the individual to a program/location within the agency, completing the IDF, etc.).

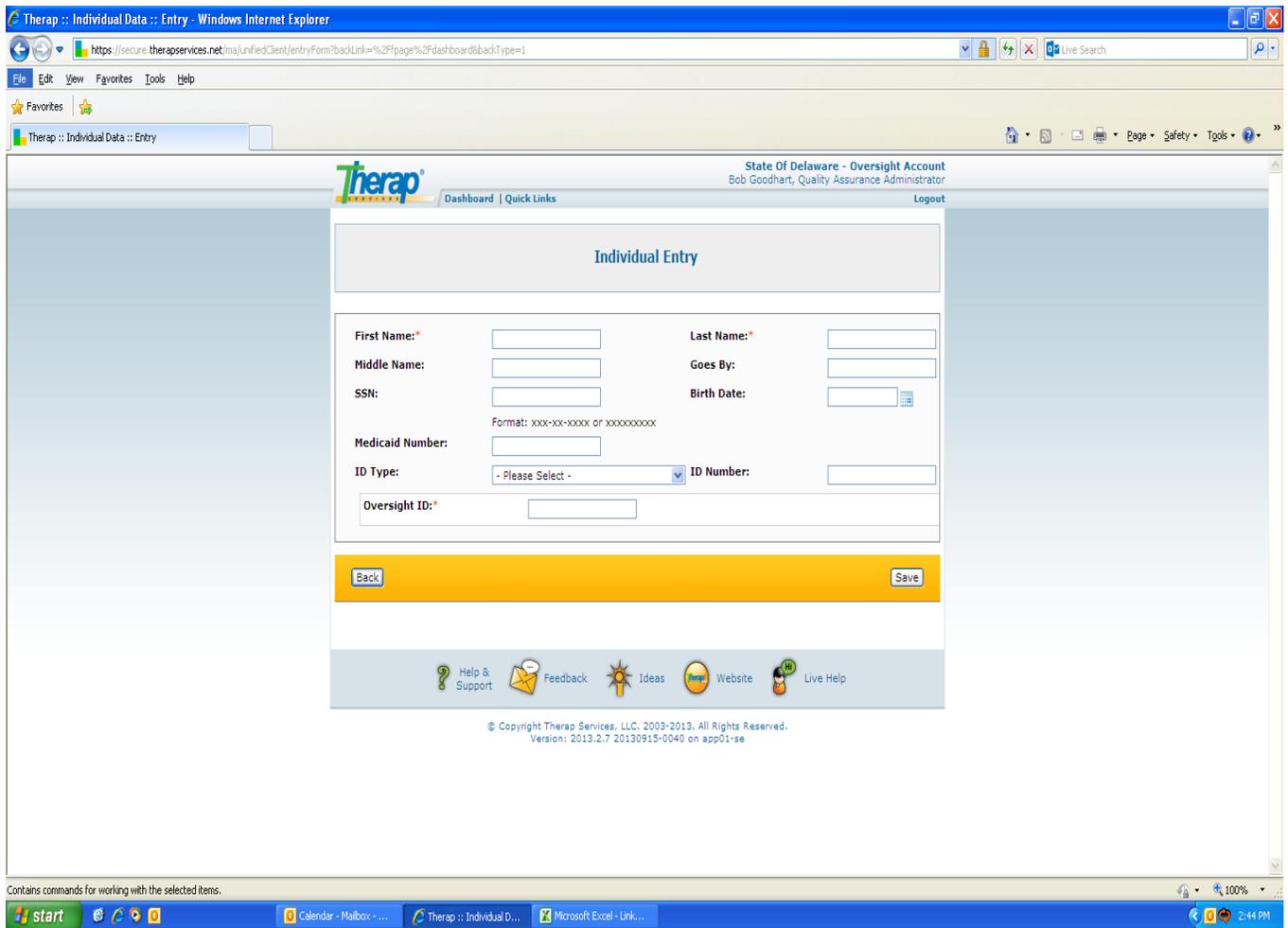
Should the provider agency be ready to begin providing services to an individual and the agency has not yet received a referral within the Electronic Case Record System (Therap), an email will need to be sent to **DDDS_ECRSRequest@state.de.us** listing the individual’s name, MCI# (Medicaid #), DOB to ensure that the proper individual is being referred to you, if the MCI# is not available then include the SSN in the request. After the email is received, all attempts will be made to generate a referral to the agency within 24 hours for the individual listed within the email. It is suggested that a separate email is sent regarding specific requests. Currently referrals will be generated based on the “manager alerts” that are processed as known service providers are identified for each individual. As a double check, the Change of Status (COS) report and the funding authorization forms generated within DDDS will be used as double checks to make sure that referrals are done on a timely basis.

As we refine the process, future guidance regarding the implemented changes outlined below will be distributed.

To Begin The Registration Process:

When information is received from DDDS Intake/Application unit, after eligibility is determined, the process for enrollment in the Electronic Case Record System (Therap) is as follows:

1. The **DDDS Intake/Application staff (or designee)** will Login to Therap under the DDDSOS account and complete the following
2. Click on “New” under the Individual Intake section
3. The following screen will open



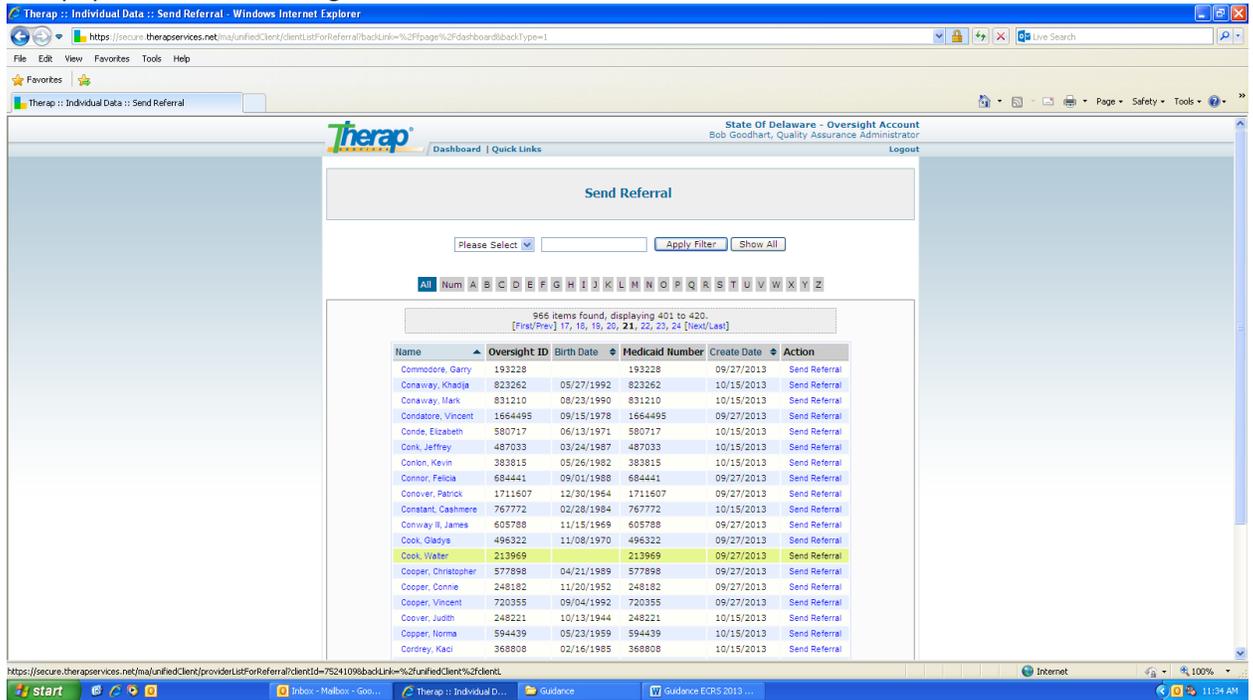
4. Complete Information (First Name, Last Name, Middle Name, SSN, Birth Date, Medicaid Number – 10 digit number, ID Type select DE-DE DDDS MCI#, ID number is MCI # with leading zeros) for Oversight ID use the MCI Number without the leading zeros.
5. Click “save”
6. Click on “open individual data page”
7. Scroll to bottom and click “Edit Individual Data”
8. Enter any other information available from the DDDS Registry or the MCI system such as residential address, race, citizenship, marital status, religion, mailing address (click same as Residential in most cases) then scroll to bottom and “save”.
9. Click Dashboard
10. Click “Pending Admission” under Individual Intake
11. Click on individual’s name
12. Hit enter key
13. Enter admission date into field (use eligibility date if known)
14. Click Save

When the DDDS designee completes the above process, each record associated with the individual will be linked. This will position us for implementing a pilot program to establish the access protocols that will be granted to users based on the position(s) that they hold within their organization. We are still working with Therap to define this record access process.

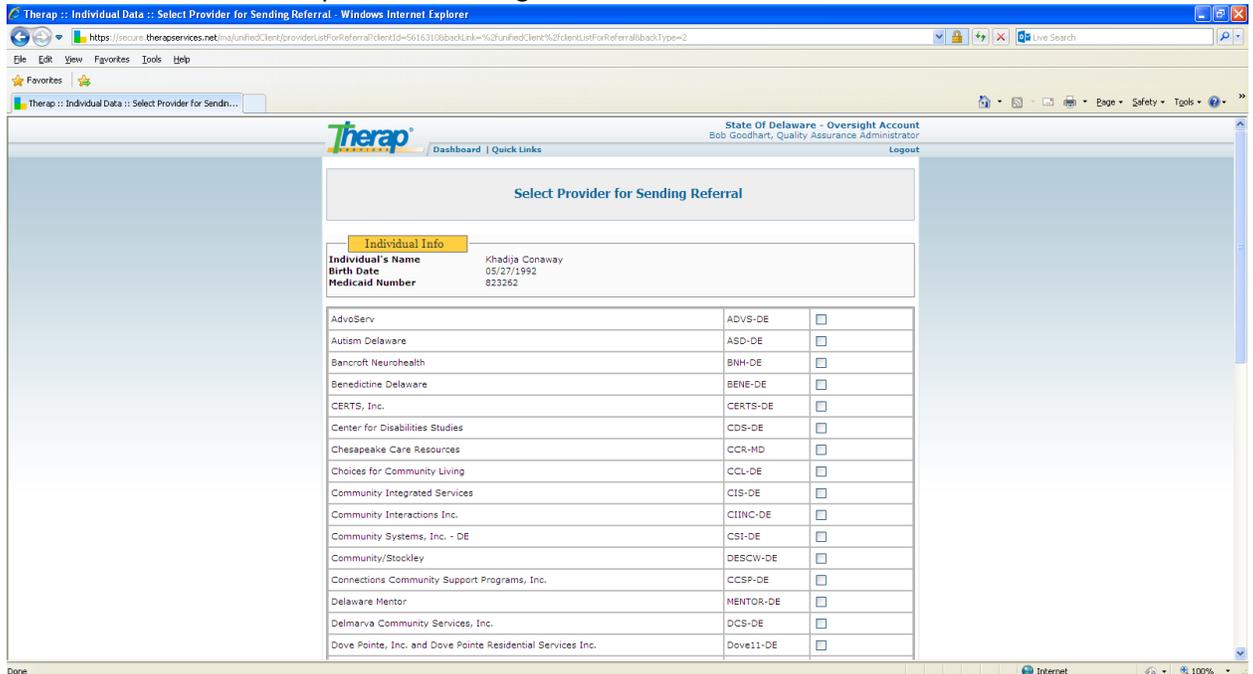
Making a Referral:

When internal DDDS notice has been received that a provider has been selected by an individual to provide a specific service, (via Prior Authorizations, Manager Alerts, etc.) the **DDDS designee** will make a referral in the Oversight Account using the following steps:

1. On the dashboard under Multi-Provider Individual, click on “Select Individual for Referral”
2. This populates the following screen



3. Search for the individual to be referred and click on “Send Referral” to the far right of the individual’s name. It will open the following screen:



4. Check the box for each provider that the individual is being referred to and then click on “Send Referral” at the bottom right of the screen. This will generate a referral in the system to the designated provider.

Receiving Referrals:

Each provider agency will need to establish an internal process for checking Therap for referrals/admissions. If an agency is ready to begin services to an individual and the individual is not showing as a pending admission within the system, then an email needs to be generated to the generic email account **DDDS_ECRSRequest@state.de.us** with the name of the individual, the MCI # (Medicaid #), the beginning date of service authorization, and the agency name. It is our hope that with refinements to the flow of information referrals will be made prior to the agency being ready to begin service provision.

To receive a referral, the agency designee will:

1. Login to the system
2. Click on the “Admin” tab on the upper left side of the screen.
3. Scroll Down to the “Care” section and to the right of Individual Intake, click “pending admissions”.
4. Select the individual you wish to admit into your program and complete the remaining part of the process as you have been previous (admitting into a program, completing missing IDF information, etc.).
 - a. The information that is completed in the IDF of the oversight account will transfer at the time of the “new” referral being made.
 - b. For existing clients that the agency has served previously, a referral cannot be made.
 - c. The agency designee will reactivate the record as was done previously.
5. As mentioned above, if a pending admission does not exist for the individual, and the agency has never served the specific individual before, the email should be sent to the generic email addressed referenced above. It is DDDS’s intent to respond to the email and initiate a referral within 24 hours during Monday-Friday, except for state recognized holidays.