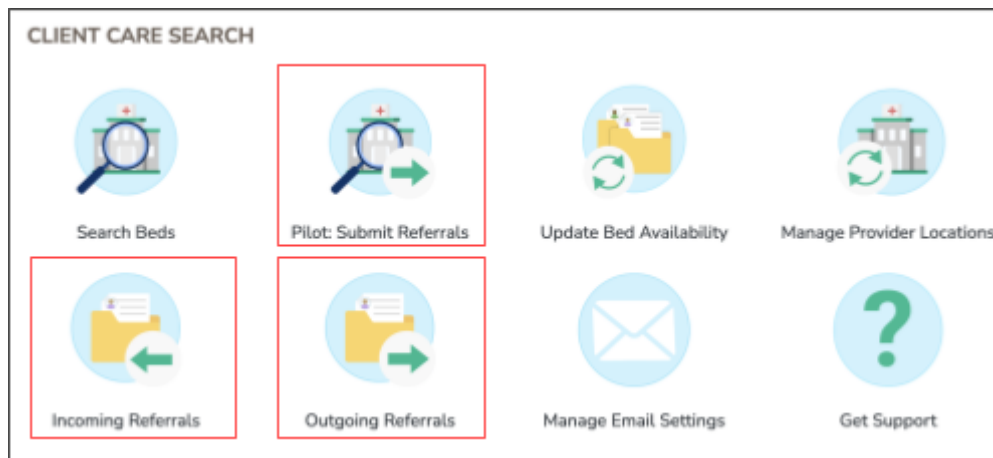




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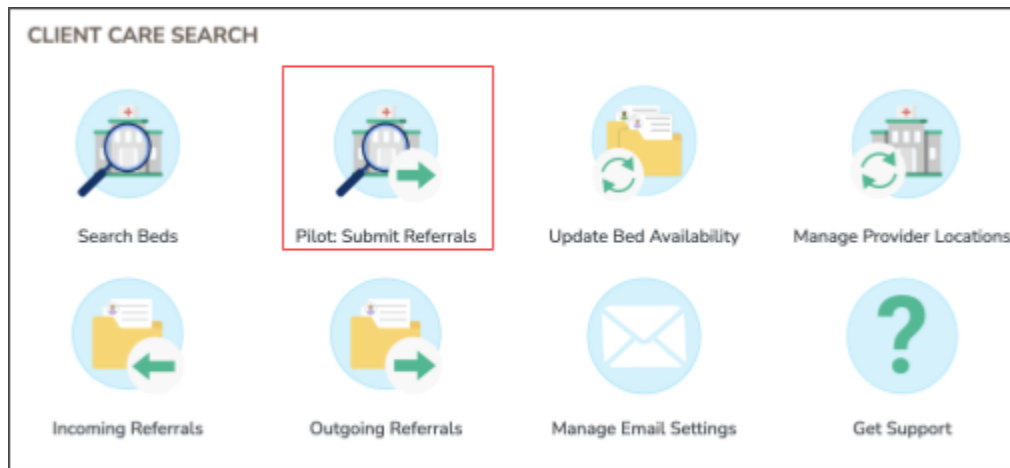
Client Care Search Referrals Pilot User Guide



From September 3rd -September 13th 2024, we will be testing a new set of referral features allowing users of Client Care Search to send and receive referrals requests within the platform. After this two-week period, we will remove these features from the system and make improvements based on user feedback. These new features will be automatically added to your Client Care Search account. Most users will not see the “Incoming Referrals” page, as that is only a feature for the participating provider locations. The following provider locations will be accepting referrals within the system for that two week period:

- Mile High Behavioral Healthcare - Westminster, Aspen Miracle Center
- Jefferson Center for Mental Health - Zang, Lakewood Adult Residential Recovery
- Peaks Recovery Centers - 1755 Old Ranch Rd
- Peaks Recovery Centers - 1785 Old Ranch Rd, Women’s Program
- Peaks Recovery Centers - 1865 Old Ranch, Men’s Program

Submit Referrals

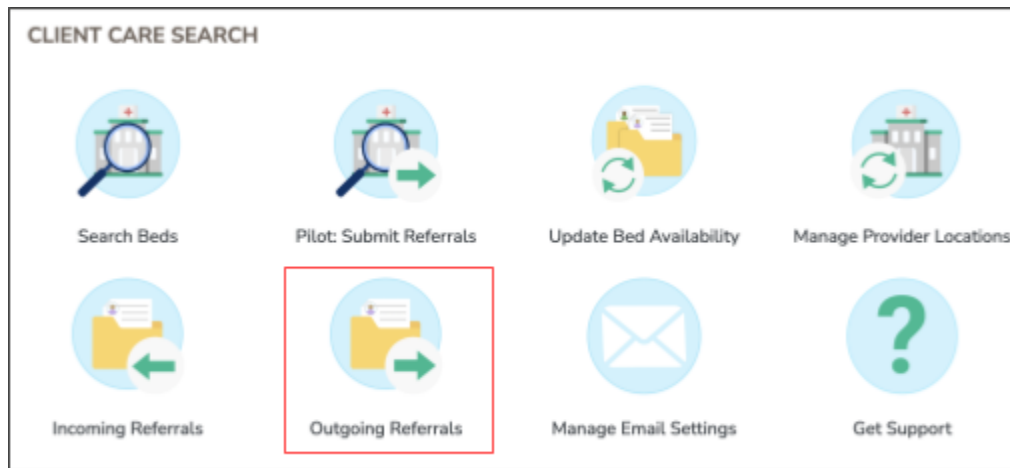


Detailed Steps

Scenario: Submit a referral request within Client Care Search

1. Begin by clicking on the “Pilot: Submit Referrals” page.
2. Apply relevant search filters to narrow the list of applicable facilities, noting the provider list will be limited to those 5 locations participating in the pilot referenced above.
3. Check desired locations, and click “Begin Referral Process.”
4. Fill out required client information, making sure not to include client name and ensuring you obtain proper consent from the client.
5. Submit the referral request, which will take you to the “Outgoing Referrals” page where you can see the Client ID you just created within your outgoing referrals list.
6. By submitting a referral request, you will get an email confirmation as well as email notifications when the provider you have referred out to engages with your request.

Manage Outgoing Referrals



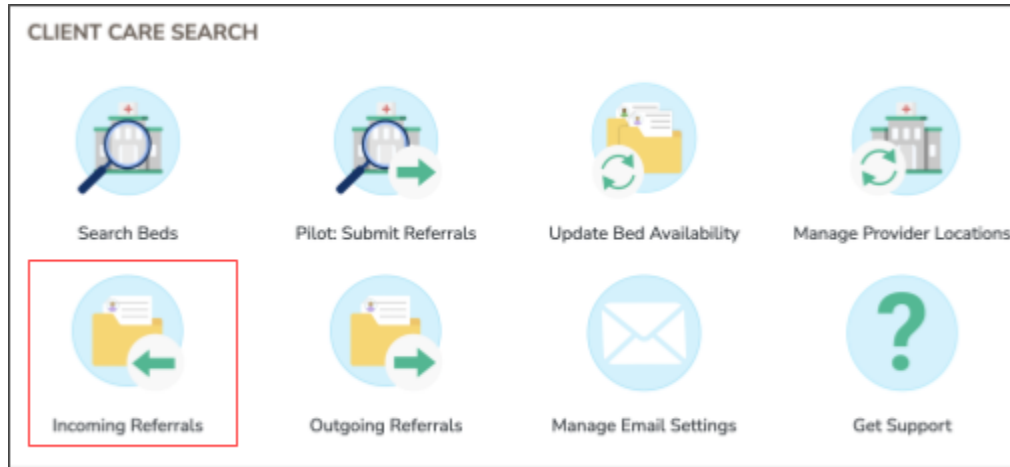
Detailed Steps

Scenario: Manage existing referral requests within Client Care Search

1. Begin by clicking on the “Outgoing Referrals” page.
2. Filter by relevant criteria, or simply click on desired Client ID.
3. You can find and add new facilities by clicking the “Find New Facilities” page, and then following the same process described in the “Submit Referrals” instructions above.
4. You can manage the existing referrals by clicking through to the “Outgoing Referral Details” page.
5. On this page, you can mark the client as placed, withdraw referral requests, close the client profile, and ping providers you have sent referral requests to. These different options will send notifications to relevant provider users.
 - a. When a client profile is marked as placed or closed, the Client ID will no longer appear in the Outgoing Referrals list.

Manage Incoming Referrals

Only users from the 5 participating provider locations will have the ability to manage incoming referrals.



Detailed Steps

Scenario: Manage incoming referral requests

1. Begin by clicking on the “Incoming Referrals” page.
2. Filter by relevant criteria, or simply click on desired Client ID.
3. On this page you can:
 - a. Reject the referral and provide the reason your organization cannot accommodate that client. Note, once rejected the Client ID will no longer be displayed in the Incoming Referrals list.
 - b. Request more information, provide the email you would like the additional information to be sent to and provide information about encryption method.
4. By submitting these options, you will receive email confirmation, and will also receive relevant notifications when the providers send referrals to your organization or make relevant updates to their client’s placement status.