MENTAL HEALTH BRIDGE REFERRALS IN APRICOT: INSTRUCTIONS FOR **PROVIDERS**

Starting on April 22, 2024, the Child and Family Health Collaborative of Ohio (CFHCO) will launch the new process for assigning and responding to Mental Health Bridge (Early Childhood) Referral Program referrals using Apricot. These changes will allow us to better track the referrals.

A lot of the process will stay the same, including your login information/password.

While change isn't always easy, we hope that this process will be more streamlined and intuitive for providers. These detailed instructions will help guide you, and we will be available to answer any questions.

Thank you for being our partner in expanding access to mental health services for children in Ohio child care centers.

Key Changes

One key change is that referrals for <u>Respite and Mental Health Bridge (Early Childhood) have been merged into the same forms in Apricot</u>. Many providers participate in both programs and will continue to have separate bulletins listing the referrals for each program. The main change that you will see is that there are some data fields that are specific to either Respite or MHB(EC). So, the MHB(EC)-specific fields will be blank for Respite referrals and vice versa. Those blank fields can be hidden for printing.

Another key change is that we can now track the assignment of a referral that moves from one provider to another without overwriting data about prior assignments. Note that you will only see referrals (and responses) that are assigned to your agency – you will never see the responses from other agencies. You should know that, as a result, there are now two forms in Apricot for a referral: 1) the main form called "Referrals – Respite and MHB" with the child and referral information submitted by the referrer as well as the Referral Status fields and 2) the Provider Response Form where you will indicate whether you can accept a referral or not.

Finally, <u>to accept a referral, you must enter an anticipated/scheduled assessment date</u>. We expect that many referrals will initially be placed in pending status while capacity or scheduling questions are resolved.

Resources

- [Apricot Tip and Tricks](#)
- The [Table of Contents](#) points to specific instructions for each topic
- [Short cuts](#) for specific provider responses to referral assignments

Please reach out to cin.admin@cfhcohio.org **with questions**

APRICOT TIPS AND TRICKS

Keep referral assignment emails out of your spam folder

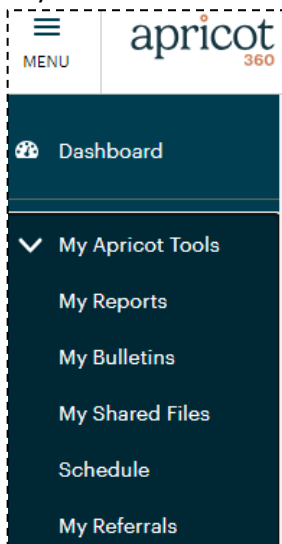Referral assignment email notifications will be sent from cin.admin@cfhcohio.org

Unhiding fields

After you enter certain responses on the Provider Response Form, new fields will be unhidden. *Sometimes it can take a moment for Apricot to show the new fields.*

When in doubt, go to "My Bulletins"

If you find yourself on a page in Apricot where you don't want to be, you can always go to "My Bulletins" to navigate back to the referral you're working on.

"My Bulletins" can be found under "My Apricot Tools" in the upper left menu:

REFRESH your Bulletin Sections!

For the most up-to-date status of referrals, click on "Click to refresh data" above EVERY section of the bulletin.

Logout of Apricot

When you have completed your work in Apricot, it's good policy to logout of Apricot. Click on your name on the very top right corner of the Apricot page; select 'Logout' at the bottom of the pull-down that appears. Apricot will also log you out after a period of inactivity.

Contents

CTRL + Click on a topic below to go directly to that page.

Shortcuts…

If you <u>cannot</u> accept the referral, see <u>these instructions</u>.

If you <u>can</u> accept the referral (and have an assessment date scheduled), see <u>these instructions</u>.

To put the referral in pending status while you determine if you can accept the referral, see <u>these instructions</u>.

When you're ready to take a referral out of pending status, see <u>these instructions</u>.

I. Responding to a Referral Assignment

A. Email Notification

You will receive an email notification when CFHCO has assigned a referral to your agency. The email will come from cin.admin@cfhcohio.org with the subject "Mental Health Bridge Early Childhood Referral: [DATE]."

B. Response Times

Declining a referral: If your agency cannot accept the referral, we ask that you respond in Apricot within 1 business day so that we can assign the referral to another provider.

Accepting / Pending a referral: If your agency can accept the referral or would like to accept the referral but requires some time to determine feasibility or a date for services (pending status), we ask that you respond in Apricot within 1-2 business days.

> ** IMPORTANT NOTE: To accept a referral, you must enter a scheduled assessment date. We expect that many referrals will initially be placed in pending status while capacity or scheduling questions are resolved.

C. Accessing the Referral

You have two options for accessing the referral:

1. Use the link in the email notification

    When you click on the link at the bottom of the email, you will login to Apricot (if you're not already logged in) and be taken to the Provider Response Form for that referral.

2. Login to Apricot and go to the "2024_MHB(EC)- Providers" Bulletin

    If you are not taken directly to your Bulletins page, select 'My Bulletins' from the menu of the top left side of the Apricot page:
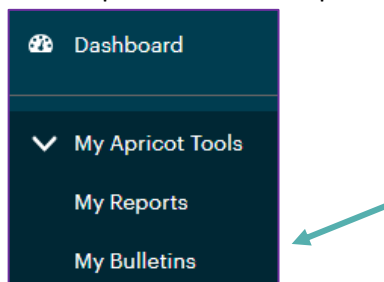
    The new referral assignment will be listed in the O-P-E-N section at the top of your bulletin. (Your bulletin has 3 sections: O-P-E-N, P-E-N-D-I-N-G, and A-C-C-E-P-T-E-D)

    Always remember to REFRESH all bulletin sections for up-to-date referral status

    > To go to the Provider Response Form to indicate your response, **CLICK ON THE DATE IN THE 1ST COLUMN** of your bulletin called 'Assigned Date: CLICK DATE TO SEE ASSIGNMENT'. (If you click on any of the columns with child demographic information, you'll go to the main form for that referral, rather than the Provider Response Form.)

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D. Indicating your Response to the Referral

The Provider Response Form looks like this:

(1)
ChildD ChildD
Quick View Information ▶

Referral Assignment ▼

(2)
*Assigned Provider 🔒
Test - MHB(EC)2

Provider Email Address 🔒
glthomson@aol.com (Change)

Only for referrals after April 22, 2024:

Creation Date (Quick View) = Date Request Submitted by Referrer

Creation Date (below) = Date Assigned to Provider

Creation Date
04/18/2024 2:57 PM EDT

Referral Notes
Notes

Provider Response - INITIAL ▼

(3)
Can you accept this referral?
○ Yes
○ Pending
○ No

Provider Response Date (ENTER TODAY'S DATE)
MM/DD/YYYY 🗓

1. Review Child Information using Quick View

To see the information submitted by the referrer about the child and the requested MHB(EC) services, click on 'Quick View Information' under the child's name.

ChildD ChildD
Quick View Information ▶

The list of fields will appear (this image shows only some of the fields):

Which program?	MHB(EC)
Referral Status	Active
Creation Date	03/23/2024 12:08 PM EDT
Referral Date - Historical	
Child Name	ChildD ChildD
Preferred Name	
County of Residence	Highland
DOB	01/01/2020
Age	4
Social Security Number	
Medicaid Number	
Race or Ethnicity	Two or More Races
Gender Identity	Female
MHB_Child's medical insuran...	Uninsured

This 'Creation Date' is the date the MHB(EC) request was submitted by the referrer <u>for referrals *after* 4/22/24</u>. (Otherwise, disregard it.)

'Referral Date – Historical' will show the date the MHB(EC) request was submitted by the referrer for referrals *prior to* 4/22/24.

Fields beginning with 'RSP_' apply to Respite referrals and will be blank for MHB(EC) referrals. These can be hidden for <u>printing</u>.

To collapse the Quick View fields, simply click on 'Quick View Information' under the child's name.

2.   Referral Assignment Section

Referral Assignment ▾

*Assigned Provider 🔒
Test - MHB(EC)2

Provider Email Address 🔒
glthomson@aol.com (Change)

Only for referrals after April 22, 2024:

Creation Date (Quick View) = Date Request Submitted by Referrer

Creation Date (below) = Date Assigned to Provider

Creation Date
04/18/2024 2:57 PM EDT

Referral Notes
Notes

- The 'Assigned Provider' and 'Provider Email Address' fields should reflect your agency. (Contrary to what the 'Change' button would seem to indicate, you are not able to change the email address. Please contact cin.admin@cfhcohio.org if you need to change the email address where referral assignments are sent.)
- 'Creation Date' is the date that CFHCO sent the referral assignment to you ONLY for referrals after April 22, 2024 (otherwise, disregard this date).
- You may enter any 'Referral Notes'. CFHCO may also include notes in this field. Only you and CFHCO can see these notes. No other providers will have access to these notes.

3.   Provider Response – INITIAL

Provider Response - INITIAL ▾

Can you accept this referral?
○ Yes
○ Pending
○ No

Provider Response Date (ENTER TODAY'S DATE)
MM/DD/YYYY 📅

This is where you indicate your agency's initial response to the referral. We will walk through each option below. Again, here are the response times:

Declining a referral: If your agency cannot accept the referral, please respond in Apricot within 1 business day so that we can assign the referral to another provider.

Accepting / Pending a referral: If your agency can accept the referral or would like to accept the referral but requires some time to determine feasibility or an assessment date (pending status), we ask that you respond in Apricot within 1-2 business days.

** IMPORTANT NOTE: **You will only be able to accept a referral if you enter a scheduled assessment date**. We expect that many referrals will initially be placed in pending status while capacity or scheduling questions are resolved.

If you cannot accept the referral, see these instructions.

If you can accept the referral (and have an assessment date), see these instructions.

If you need to put the referral in pending status while you to resolve capacity or scheduling questions, see these instructions.

Can you accept this referral? = No

Provider Response - INITIAL ▾

Can you accept this referral?
○ Yes
○ Pending
○ No

Provider Response Date (ENTER TODAY'S DATE)
MM/DD/YYYY 📅

If you cannot accept the referral, choose 'No'.

The 'Provider Response Date' is now required. Click on the calendar icon 📅 and use the calendar to select **today's date** – which will be highlighted.

Once you have selected 'No' and entered today's date, the 'MHB(EC) Decline' section will appear:

MHB(EC) Decline ▾

*Primary Reason for Declining - MHB(EC)
--Please Select--

--Please Select--
No capacity (clinicians)
Request for service withdrawn
Parent/Guardian non-responsive
Other

Declined Notes - MHB(EC)
Notes

Select the most fitting option in the 'Primary Reason for Declining' pull-down. This field is required. If you select 'Other', enter the other reason in the text box that appears.

You may enter any 'Declined Notes'. Only you and CFHCO can see these notes.

Once you have selected the Primary Reason for Declining, the 'Ready to Submit?' section will appear:

Ready to Submit? ▾

Complete the required fields above.

When you are ready to submit, check YES below and then Save Record.

If you selected "Pending," you will return to this page when you are ready to take the referral out of pending status and complete a section that will appear below.

*READY TO SUBMIT? (the moment you check 'YES', you will not be able to edit your responses in the "Provider Response - INITIAL" section above)

☐ <- YES ->
This field is required.

The moment you check 'YES', you will not be able to edit your responses in the "Provider Response – INITIAL" section above. The 'Can you accept this referral?' and 'Provider Response Date' fields will be locked when you select 'YES' for 'Ready to Submit?'.

If you are certain about your entries, select 'YES' for 'Ready to Submit?'. The 'Ready to Submit?' section will disappear. Click 'Save Record' in the upper right 'Record Options' menu.

Record Options ▾
💾 Save Record
🖨 Print Mode
📅 View History
📁 View Folder
🔍 Go To Search

The Record Saved pop-up box at the top of the form offers the following choices:

↻   Record Saved   ⊠
Record saved! Click anywhere to reload the page.
[Continue] [View Folder] [Go To Search]

Click 'Continue' to stay on the current form. **You are done!**

You can close the browser tab for this referral and go to your bulletin (how to get to your bulletin). When you decline a referral, it will no longer appear in any of your bulletins.

Can you accept this referral? = Yes

Provider Response - INITIAL ▼

Can you accept this referral?
○ Yes
○ Pending
○ No

Provider Response Date (ENTER TODAY'S DATE)
MM/DD/YYYY 📅

If you can accept the referral AND you have an assessment date scheduled, choose 'Yes'. (If you do not yet have an assessment date scheduled, select pending so that CFHCO knows you are working on scheduling.)

The 'Provider Response Date' is now required. Click on the calendar icon 📅 and use the calendar to select **today's date** – which will be highlighted.

Once you have selected 'Yes' and entered today's date, the 'MHB(EC) Accept' section will appear:

MHB(EC) Accept ▼

*Scheduled Assessment Date
MM/DD/YYYY 📅

Enter the 'Scheduled Assessment Date'. This field is required. Click on the calendar icon 📅 and use the calendar to select the Scheduled Assessment Date.

Once you have entered the 'Scheduled Assessment Date', the 'Ready to Submit?' section will appear:

Ready to Submit? ▼

Complete the required fields above.

When you are ready to submit, check YES below and then Save Record.

If you selected "Pending," you will return to this page when you are ready to take the referral out of pending status and complete a section that will appear below.

*READY TO SUBMIT? (the moment you check 'YES', you will not be able to edit your responses in the "Provider Response - INITIAL" section above)

☐ <- YES ->
This field is required.

The moment you check 'YES', you will not be able to edit your responses in the "Provider Response – INITIAL" section above. The 'Can you accept this referral?' and 'Provider Response Date' fields will be locked when you select 'YES' for 'Ready to Submit?'.

If you are certain about your entries, select 'YES' for 'Ready to Submit?'. The 'Ready to Submit?' section will disappear. Click 'Save Record' in the upper right 'Record Options' menu.

Record Options ▼
🖫 Save Record
🖨 Print Mode
📅 View History
📁 View Folder
🔍 Go To Search

The Record Saved pop-up box at the top of the form offers the following choices:

↻   Record Saved   ⊠
Record saved! Click anywhere to reload the page.
[Continue] [View Folder] [Go To Search]

If you want to print, click 'View Folder' (see print instructions).

If you are done, click 'Continue.' You can close the browser tab for this referral and go to your bulletin (how to get to your bulletin). When you accept a referral, it will appear in the A-C-C-E-P-T-E-D section of your bulletin.

Can you accept this referral? = Pending

Provider Response - INITIAL ▼

Can you accept this referral?
○ Yes
○ Pending
○ No

Provider Response Date (ENTER TODAY'S DATE)
MM/DD/YYYY 📅

If you would like to accept the referral, but need to resolve capacity or scheduling questions, choose 'Pending'. CFHCO will know you are working to determine if you can accept the referral.

The 'Provider Response Date' is now required. Click on the calendar icon 📅 and use the calendar to select **today's date** – which will be highlighted.

Once you have selected 'Pending' and entered today's date, the 'MHB(EC) Pending' section will appear:

MHB(EC) Pending ▼

*Reason(s) for Pending (choose all that apply) - MHB(EC)
☐ Waiting for response from Parent/Guardian
☐ Waitlisted
☐ Other
This field is required.

Pending Notes - MHB(EC)
Notes

Check one or more applicable 'Reason(s) for Pending' from the list. This field is required. If you select 'Other', enter the other reason in the text box that appears.

You may enter any 'Pending Notes'. Only you and CFHCO can see these notes.

Once you have entered the 'Reason(s) for Pending', the 'Ready to Submit?' section will appear:

Ready to Submit? ▼

Complete the required fields above.

When you are ready to submit, check YES below and then Save Record.

If you selected "Pending," you will return to this page when you are ready to take the referral out of pending status and complete a section that will appear below.

*READY TO SUBMIT? (the moment you check 'YES', you will not be able to edit your responses in the "Provider Response - INITIAL" section above)

☐ <- YES ->
This field is required.

The moment you check 'YES', you will not be able to edit your responses in the "Provider Response – INITIAL" section above. The 'Can you accept this referral?', 'Provider Response Date', and 'Reason(s) for Pending' fields will be locked when you select 'YES' for 'Ready to Submit?'.

If you are certain about your entries, select 'YES' for 'Ready to Submit?'.

The 'Ready to Submit?' section will disappear and the 'COMPLETE WHEN PENDING STATUS ENDS' section will appear. Do not enter any information into the new section now – you will return to this page when you are ready to take the referral out of pending status and indicate that either you are accepting or declining the referral.

Record Options ▼
💾 Save Record
🖨 Print Mode
📅 View History
📁 View Folder
🔍 Go To Search

Click 'Save Record' in the upper right 'Record Options' menu.

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Can you accept this referral? = Pending (cont'd)

The Record Saved pop-up box at the top of the form offers the following choices:
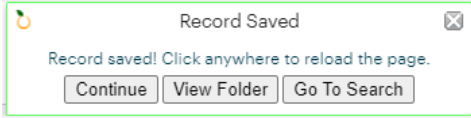
If you want to print, click 'View Folder' (see printing instructions).

If you are done, click 'Continue.' You can close the browser tab for this referral and go to your bulletin (how to get to your bulletin). When you put a referral in pending status, it will appear in the P-E-N-D-I-N-G section of your bulletin.

When you are ready to take a referral out of Pending status:

Go to the P-E-N-D-I-N-G section of your bulletin and locate the referral (how to get to your bulletin).

__Always remember to REFRESH bulletin sections for up-to-date referral status__

To go to the Provider Response Form to indicate your response, **CLICK ON THE DATE IN THE 1ST COLUMN** called 'Assigned Date: CLICK DATE TO SEE ASSIGNMENT'. (If you click on any of the columns with child demographic information, you'll go to the main form for that referral, rather than the Provider Response Form.)

In the Provider Response Form, scroll down to the 'COMPLETE WHEN PENDING STATUS ENDS' section:

If you __cannot__ accept the referral after pending status, see these instructions.

If you __can__ accept the referral after pending status (and have an assessment date scheduled), see these instructions.

After pending, can you accept this referral? = No

If you cannot accept the referral after pending, click 'No'.

The 'Provider Response Date AFTER PENDING' is now required. Click on the calendar icon ⬜ and use the calendar to select **today's date** – which will be highlighted.

Once you have selected 'No', the 'MHB(EC) Decline' section will appear ABOVE:

Select the most fitting option in the 'Primary Reason for Declining' pull-down. This field is required. If you select 'Other', enter the other reason in the text box that appears.

You may enter any 'Declined Notes'. Only you and CFHCO can see these notes.

Once you have entered the 'Primary Reason for Declining, the 'Ready to Submit after Pending?' section appears:

The moment you check 'YES', you will not be able to edit your responses in the 'Complete when Pending Status Ends' section above. The 'After pending, can you accept this referral?' and 'Provider Response Date AFTER PENDING' fields will be locked when you select 'YES' for 'Ready to Submit?'.

If you are certain about your entries, select 'YES' for 'Ready to Submit?'. The 'Ready to Submit?' section will disappear. Click 'Save Record' in the upper right 'Record Options' menu.

The Record Saved pop-up box at the top of the form offers the following choices:

Click 'Continue' to stay on the current form. **You are done!**

You can close the browser tab for this referral and go to your bulletin (how to get to your bulletin). When you decline a referral, it will no longer appear in your bulletin.

After pending, can you accept this referral? = Yes

COMPLETE WHEN PENDING STATUS ENDS ▼

COMPLETE THIS SECTION WHEN YOU ARE READY TO TAKE THE REFERRAL OUT OF PENDING STATUS

After pending, can you accept this referral?
○ Yes
○ No
Provider Response Date AFTER PENDING (ENTER TODAY'S DATE)
MM/DD/YYYY 📅

If you can accept the referral after pending AND you have an assessment date scheduled, click 'Yes'.

The 'Provider Response Date AFTER PENDING' is now required. Click on the calendar icon 📅 and use the calendar to select **today's date** – which will be highlighted.

Once you have selected 'Yes', the 'MHB(EC) Accept' section will appear ABOVE:

MHB(EC) Accept ▼

*Scheduled Assessment Date
MM/DD/YYYY 📅

Enter the 'Scheduled Assessment Date'. This field is required. Click on the calendar icon 📅 and use the calendar to select the Scheduled Assessment Date.

Once you have entered the 'Scheduled Assessment Date', the 'Ready to Submit after Pending?' section appears:

Ready to Submit after Pending? ▼

Complete the required fields above.

When you are ready to submit, check YES below and then Save Record.

*READY TO SUBMIT? (the moment you check 'YES', you will not be able to edit your responses in the 'Complete when Pending Status Ends' section above)
☐ <- YES ->
This field is required.

The moment you check 'YES', you will not be able to edit your responses in the 'Complete when Pending Status Ends' section above. The 'After pending, can you accept this referral?' and 'Provider Response Date AFTER PENDING' fields will be locked when you select 'YES' for 'Ready to Submit?'.

If you are certain about your entries, select 'YES' for 'Ready to Submit?'. The 'Ready to Submit?' section will disappear. Click 'Save Record' in the upper right 'Record Options' menu.

Record Options ▼
💾 Save Record
🖨 Print Mode
📅 View History
📁 View Folder
🔍 Go To Search

The Record Saved pop-up box at the top of the form offers the following choices:

Record Saved ⊠
Record saved! Click anywhere to reload the page.
[Continue] [View Folder] [Go To Search]

If you want to print, click 'View Folder' (see print instructions).

If you are done, click 'Continue.' You can close the browser tab for this referral and go to your bulletin (how to get to your bulletin). When you accept a referral, it will appear in the A-C-C-E-P-T-E-D section of your bulletin.

E.   Printing from Folder View

If you want to print the child and referral information submitted by the referrer, go to Folder View for the referral. You will also have the option of printing the information entered on the Provider Response Form.

While there are different ways to get to Folder View, the recommended way is to **go to Folder View from the Provider Response Form** (how to get to the Provider Response Form).

From the Provider Response Form, click 'View Folder' in the upper right 'Record Options' menu.
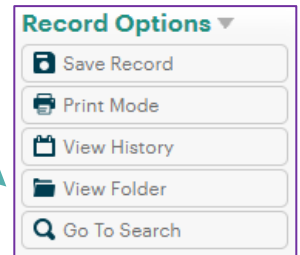
In Folder View, choose   **Print 🖨**   in the top right corner:
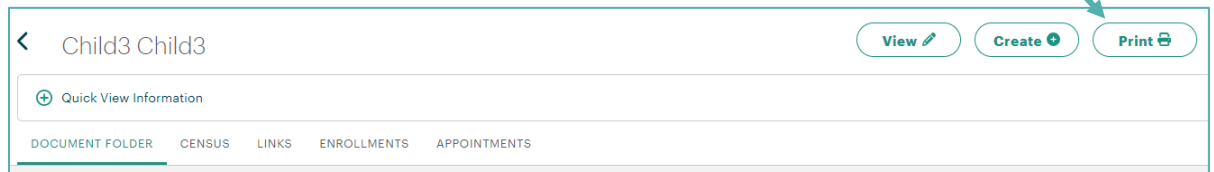
This box will pop up:
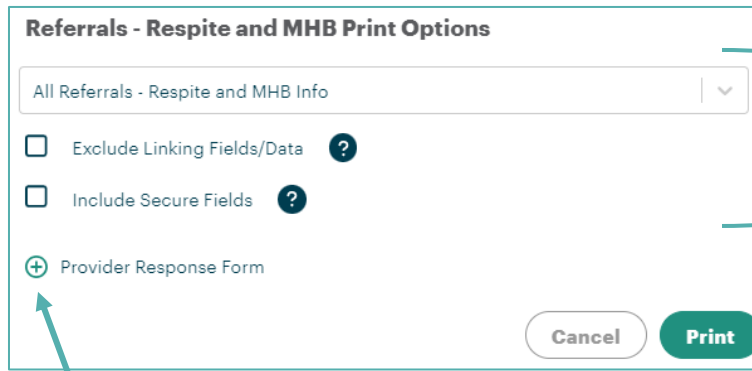
You don't need to change the pull-down or check these boxes.

If you only want to print the child and referral information submitted by the referrer, click 'Print.'

If you want to also print the information from the Provider Response Form, select the ⊕ next to 'Provider Response Form'. These additional lines will appear:
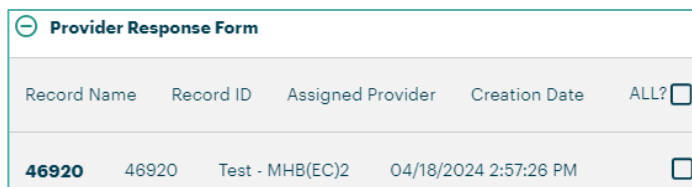
Check the box to include the information from the Provider Response Form in your printing.

The Print View will open in a new tab.

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In Print View, we recommend ALWAYS unchecking 'Show Empty Values' in the 'Print Options' menu on the right side of the page. That way, you will only see the fields that contain entries. And you will not see any of the Respite-specific fields.

It is also useful to uncheck 'Enable Record Pagebreaks' which avoids having an extra blank page.
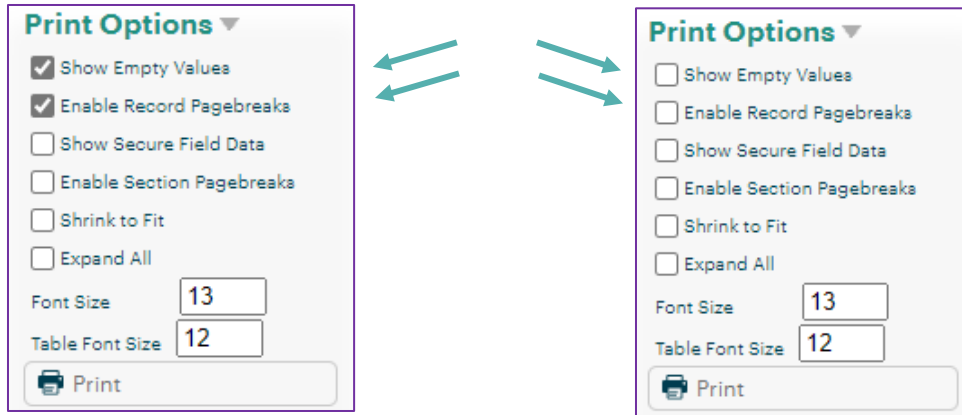
Feel free to change the 'Font Size' (that is the only other setting worth changing), then click 'Print'.

Ignore the 'Labels for Intake Forms' section appears at the bottom of the page. We wish that didn't have to appear.

When you are done printing, you can exit out of the Print View tab.

F.   Special Circumstances

1.   Leaving the Provider Response Form BEFORE SAVING

There may be a time when you enter an incorrect response on the Provider Response Form and can't change it. IF YOU HAVEN'T CLICKED 'SAVE RECORD', you can close the browser tab for that referral and start fresh from your bulletin.
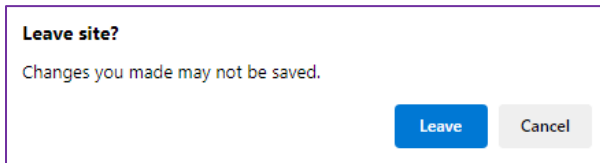
When you close the browser tab <u>without</u> clicking 'Save Record', you will see this pop up at the top of the screen:

Select 'Leave'. The browser tab will close and none of your changes will be made. The Provider Response Form will be just as it was before you opened it. You can return to your bulletin and start fresh.

2.   Requesting to Re-Open a Recently Declined Referral

If you declined a referral within the prior 1-2 weeks and you realize that you can now accept that referral, you can take the following steps:

Note that any referral you declined will not appear in your bulletin.

- Email cin.admin@cfhcohio.org to request to re-open the referral, by either:
  o   Replying to the email where the referral was assigned to you, or
  o   Sending an email to cin.admin@cfhcohio.org including the child's last name and the date the referral was assigned to you
- CFHCO will reply within 1-2 business days indicating whether we can or cannot re-open the referral for you
  o   The referral may have been assigned to another provider
- If CFHCO can re-open the referral for you, you will receive another email assigning the referral to you. You would then go through the referral acceptance process.

3.   Rescinded Assignments

Assignments will rarely be rescinded.

If a provider does not respond to a referral assignment in a reasonable amount of time, CFHCO may decide to rescind the assignment and send the referral to another provider. If you have been assigned a referral and it is rescinded, you will receive an email notification. When an assignment is rescinded, you will no longer see the referral in your bulletin and the link in the original assignment notification email will no longer work.

If you have questions about a rescinded referral, contact cin.admin@cfhcohio.org.

G.   Understanding Your Provider Bulletin

The Provider Bulletin has three sections: O-P-E-N, P-E-N-D-I-N-G, and A-C-C-E-P-T-E-D:

O-P-E-N   Referrals assigned by CFHCO; Provider has not yet responded
P-E-N-D-I-N-G   Provider has put the referrals in pending status to resolve capacity or scheduling questions
A-C-C-E-P-T-E-D Provider has accepted the referrals and entered the scheduled dates for MHB(EC) assessments

Always remember to REFRESH all bulletin sections for up-to-date referral status

To go to the Provider Response Form, click on the date in the 1st column called 'Assigned Date: CLICK DATE TO SEE ASSIGNMENT'.

If you click on any of the columns with child demographic information, you'll be taken to the main form for that referral, rather than the Provider Response Form. Providers can view, but not edit the main form. Providers can both view and edit the Provider Response Form.

2024_MHB(EC) - Providers ▼ — MHB(EC) - Provider

O-P-E-N
Report last run April 18th 2024, 4:20 pm
Click to refresh data

Displaying 1 of 1 Rows (Expand All Cells)

Assigned Date: CLICK DATE TO SEE ASSIGNMENT	Days Since Assignment	Child Last	Child First	DOB	County of Residence	Referral Status
04/18/2024 4:20 PM	0	ChildG	ChildG	07/10/2020	Highland	Active

Total Rows 1

P-E-N-D-I-N-G
Report last run April 18th 2024, 3:39 pm
Click to refresh data

Assigned Date: CLICK DATE TO SEE ASSIGNMENT	Days Pending	Child Last	Child First	DOB	County of Residence	Provider Response Date	Reason(s) for Pending	Pending Notes

Total Rows 0

A-C-C-E-P-T-E-D
Report last run April 18th 2024, 4:16 pm
Click to refresh data

Displaying 1 of 1 Rows (Expand All Cells)

Assigned Date: CLICK DATE TO SEE ASSIGNMENT	Child Last	Child First	DOB	County of Residence	Initial Provider Response Date	Accept Date (after pending)	Scheduled Assessment Date
04/18/2024 2:57 PM	ChildD	ChildD	01/01/2020	Highland	04/18/2024		04/26/2024

II.   Other Things to Know

A.   New MHB(EC) Referral Link

MHB(EC) referrals will be submitted using a new link: MHB(EC) Referral

The new MHB(EC) referral intake form is almost identical to the prior form, and the prior form will direct referrers to the new one.

B.   'Referral Status' Field

The 'Referral Status' field appears on the main form and will no longer be editable by providers. CFHCO will set the referral status choosing among the following options:

Referral Status
- ◯ Received
- ◉ Active
- ◯ Closed - Accepted
- ◯ Closed - Not Placed

The 'Active' referral status includes any referrals that are open or pending with a provider.

C.   Notification to Referrer

- When a referral is **accepted** by a provider (with a scheduled assessment date), CFHCO changes the referral status to Closed-Accepted and an email is sent to the referrer indicating acceptance:

> Thank you for submitting a referral for the Mental Health Bridge Early Childhood Program! After careful consideration the following determination has been made:
>
> REFERRAL ACCEPTED: Your referral has been accepted. The provider agency will contact the family or guardian directly to schedule care.
>
> Child's Last Name: [Child Last Name]
> Date of Referral: [Referral Date]

- When a referral **cannot be fulfilled** for whatever reason (ineligibility, lack of capacity, lack of parent/guardian response, etc.), CFHCO changes the referral status to Closed-Not Placed and an email is sent to the referrer indicating that the referral could not be placed along with the primary reason:

> Thank you for submitting a referral for the Mental Health Bridge Early Childhood Program. After careful consideration the following determination has been made: Your referral has been rejected.
>
> Child's Last Name: [Child Last Name]
> Date of Referral: [Referral Date]
> Reason for Rejection: [Reason for Declining]
>
> Please contact MHBridge@ohiochildrensalliance.org with any questions.

D.   'Creation Date' Fields

Apricot captures the 'Creation Date' for all records. We cannot change the name since it's a system field, but we've included notes in Apricot to clarify what each 'Creation Date' represents. Here is a more complete explanation:

Main Form 'Creation Date':
- Prior to the April 22, 2024 launch, the 'Creation Date' field will represent the date that the referral record was uploaded to the new form. This is irrelevant. Instead, the 'Referral Date – Historical' field will indicate the date the referral was made.
- As of April 22, 2024, the 'Creation Date' field will represent the date that the referral request was submitted by the referrer.

Provider Response Form 'Creation Date':
- Prior to the April 22, 2024 launch, the 'Creation Date' field will represent the date that the referral record was uploaded to the new form. This is irrelevant. We did not previously capture that date.
- As of April 22, 2024, the 'Creation Date' field will represent the date that the referral assignment was made to a provider.

E.   Main Form

As noted on the first page, there are now two forms in Apricot for a referral: 1) the main form called "Referrals – Respite and MHB" with the child and referral information submitted by the referrer as well as the CFHCO Referral Status fields and 2) the Provider Response Form where you will indicate whether you can accept a referral or not.

Providers can view, but not edit the main form. Virtually all the fields that are on the main form will appear in the Quick View list that you can see when you're in the Provider Response Form.

From the list of referrals in your bulletin, if you click on the child demographic information for a referral, Apricot will open a new tab with the main form for that referral. You are welcome to review the information. When you are done, you can just close the browser tab and go back to your bulletin.

APPENDIX A: Apricot Account Tips

Link to Login to Apricot

After you have set up an Apricot account, you can use this link to the **Apricot Login page**:

Your USERNAME is the email address associated with your agency for MHB(EC) referrals.

Troubleshoot using "Forgot Password"

If you have trouble logging in to Apricot (after you've set up your account), click "Forgot Password." You will enter the email address associated with your agency for MHB(EC) referrals and click:

You will receive an email with a link to reset your password.

The email says the link is valid for 30 minutes. If you miss the 30-minute window, you can start the "Forgot Password" process again.

If you are still having problems, please contact: gillian.thomson@ohiochildrensalliance.org **AND** scott.warren@ohiochildrensalliance.org with the subject APRICOT LOGIN PROBLEM.

Logout of Apricot

When you have completed your work in Apricot, it's a good policy to logout of Apricot.

Click on your name on the very top right corner of the Apricot page; select "Logout" at the bottom of the pull-down that appears.

Apricot will also log you out after a period of inactivity.