Child & Family

CFHCO REFERRAL MANAGEMENT TRAINING

Apricot 360 Referral Process effective 4/22/24

Respite Care & Mental Health Bridge Early Childhood Programs

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Meeting Agenda

1. Welcome
2. Purpose
3. Overview of changes
4. Bulletins
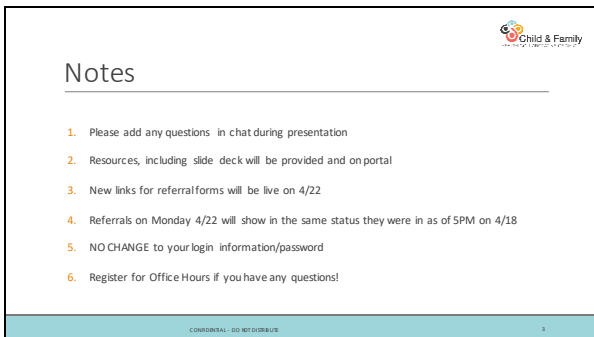5. How to Review a Referral
6. How to Respond to Referrals
7. Test Referral in Apricot
8. Printing & Saving Referrals

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Notes

1. Please add any questions in chat during presentation

2. Resources, including slide deck will be provided and on portal

3. New links for referral forms will be live on 4/22

4. Referrals on Monday 4/22 will show in the same status they were in as of 5PM on 4/18

5. NO CHANGE to your login information/password

6. Register for Office Hours if you have any questions!

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PURPOSE

The current referral process was designed in Spring 2022 for Respite Care Program and adapted for MHBEC. Now designed for referral program.

The referral process changes will allow us to better track referral we are receiving, while making the referral process more efficient for multiple providers to be processing referrals!

We thank you for your partnership and participation in this program!

CHANGES

For Providers who were onboarded prior to 4/22/24 the following are new changes to the referral process:

- New Provider response form
- Combined "MHB" and "RSP" Programs
- Ready to Submit section
- Printing from folder view
- Provider Response date
- Referral Source info moved to bottom on the form
- ACCEPTED bulletin will show referrals from 1/1/24

EMAIL NOTIFICATION

When you click on the link at the bottom of the email, you will be taken directly to the Provider Response Form for that referral

Mental Health Bridge Early Childhood Referral - 04/18/2024 2:57 PM EDT

cin.admin@cfhcohio.org <no-reply@socialsolutio

To: Gillian Thomson, CIN Admin, Do Not Reply

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hello Test - MHB(EC)2!

You have received a new Mental Health Bridge Early Childhood Referral from Ohio Children's Alliance.

Name of Referral: **ChildD**

County of Referral: **Highland**

Your ability to accept the referral, including pending referrals, should be **submitted in Apricot within days** from receipt of this notification.

If you cannot accept the referral, please respond within 1 business day.

If you have questions, please reply to: cin.admin@cfhcohio.org

Please click the link below to review and respond to the referral in Apricot.

Thank you in advance.

MHB(EC) Referral Team

https://apricot.socialsolutions.com/document/edit/id/46920

RESPONSE TIMES

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ACCEPT/PENDING

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

** IMPORTANT NOTE: To accept a referral, you must enter an *anticipated date for services*. We expect that many referrals will initially be placed in pending status and the date may change!

DECLINING

If your agency cannot accept the referral, we ask that you respond in Apricot **within 1 business day**

CFHCO will assign the referral to another provider, if available, so a quick response is appreciated!

Contact Eliza or cin.admin@cfhcohio.org if you need a previously denied referral reopened/in 1-2 weeks (e.g parent responded after denial)

BULLETINS

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

When in doubt, go to "My Bulletins"

NEW Referrals assigned by CFHCO; Response needed

Provider working on contacting families/scheduling service

Provider accepted referral (1/1/24)

*When you decline a referral, it will no longer appear in your bulletins

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HOW TO REVIEW REFERRAL

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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.

HOW TO REVIEW REFERRAL

To see the information submitted by the referrer click on 'Quick View Information' under the child's name

Notes from CRICD about the referral may be entered here

Fields beginning with 'MHB_' apply to MHB referrals and will be blank for Respite referrals. Fields with 'RSP_' apply to respite referrals and will be blank for MHBEC referrals. These can be hidden for printing

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PROVIDER RESPONSE FORM - DECLINE

To go to the Provider Response Form to indicate your response, CLICK ON THE DATE IN THE 1ST COLUMN of your bulletin.

The 'Provider Response Date' is now required. Click on the calendar icon to select today's date

Once you have selected 'No' and entered today's date, the 'MHBEC Decline' section will appear:

Please enter any notes that may help find a better placement fit, if the referral is sent to another Provider!

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 textbox that appears.

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PROVIDER RESPONSE FORM - DECLINE

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

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

*When you decline a referral, it will no longer appear in your bulletin

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PROVIDER RESPONSE FORM - ACCEPT

To go to the Provider Response Form to indicate your response, **CLICK ON THE DATE IN THE 1ST COLUMN** of your bulletin.

Enter the 'Scheduled Assessment Date'. This field is required. Section opens ABOVE.

The 'Provider Response Date' is now required. Click on the calendar icon to select today's date

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

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

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.

When you accept a referral, it will appear in the A-C-C-E-P-T-E-D section of your bulletin.

PROVIDER RESPONSE FORM - PENDING

To go to the Provider Response Form to indicate your response, **CLICK ON THE DATE IN THE 1ST COLUMN** of your bulletin.

Provider Response - INITIAL ▾

Can you accept this referral?
Yes
Pending
No

Provider Response Date (ENTER TODAY'S DATE)

The 'Provider Response Date' is now required. Click on the calendar icon to select today's date

Once you have selected 'Pending' and entered today's date, the 'MHBEC 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.

PROVIDER RESPONSE FORM - PENDING

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

When you accept a referral, it will appear in the P-E-N-D-I-N-G section of your bulletin.

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.

COMPLETE WHEN PENDING STATUS ENDS ▾

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

PROVIDER RESPONSE FORM - PENDING

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

CLICK ON THE DATE IN THE 1ˢᵗ COLUMN called 'Assigned Date: CLICK DATE TO SEE ASSIGNMENT' to go to the Provider Response Form.

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

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

Indicate your response "YES" or "NO" and follow the instructions as above for ACCEPTING OR DECLINING a referral

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EXAMPLE REFERRALS IN APRICOT

1. REFERRAL PEND THEN ACCEPT
2. REFERRAL PEND THEN DENY
3. PRINT FROM FOLDER VIEW

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PRINTING – FOLDER VIEW

From the Provider Response Form (**CLICK ON THE DATE IN THE 1ˢᵗ COLUMN** of bulletin called 'Assigned Date: CLICK DATE TO SEE ASSIGNMENT'), click 'View Folder' in the upper right 'Record Options' menu

Record Options ▼
- Save Record
- Print Mode
- View History
- View Folder
- Go To Search

‹ Child3 Child3   View ✎   Create ⊕   Print ⊕
⊕ Quick View Information
DOCUMENT FOLDER   CENSUS   LINKS   ENROLLMENTS   APPOINTMENTS

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PRINTING – FOLDER VIEW

You don't need to change the pull-down or check these boxes.

If you'd like to print the response to the referral you can check the box here

In Print View, we recommend to ALWAYS uncheck '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 for your referral program (RSP or MHB)

RESOURCES

Online Resources:

cfhcohio.org/provider-portal
ohiochildrensalliance.org/mhbridgeprovider

Monday 4/22
3:00- 3:30 – Register
3:30-4:00 – Register

Tuesday 4/23
12:00 – 12:30 – Register
12:30 – 1:00 – Register

Thursday 4/25
12:00 – 12:30 – Register

Friday 4/26
10:00 – 10:30 – Register
10:30 – 11:00 – Register

Monday 4/29
12:00 – 12:30 – Register

Thank you!

If you have any questions or concerns about bulletins, referrals, or any other concerns, please contact Aditi, Eliza or cin.admin@cfhcohio.org