Quick Reference Guide: Transfer Referral

MH Residential allows Residential Providers to create new Referrals for Consumers on their active caseload. This process is started from the Consumer's Case Summary screen with the Transfer button.

Quick Overview:

1. Start the transfer process by clicking on the **Transfer** button on the Consumer's Case Summary screen.
    a. When the Consumer has been discharged, select "Discharged" from the *Case Status* drop-down.

2. Complete and **Save** the *Transfer Referral Details* pop-up. Synergy will automatically navigate to the newly created Referral's Individual Info screen. Information from the Case will carry over into the new Referral.

3. Complete and Submit the new Referral. This includes completing the following required screens:

    - **Individual Info** [Individual Info Job Aid]
    - **Referral Info** [Referral Info Job Aid]
    - **Referral Reason** [Referral Reason Job Aid]
    - **Residential Living** [Residential Living Job Aid]
    - **Treatment History** [Treatment History Job Aid]
    - **Risk Factors** [Risk Factors Job Aid]
    - **Legal History** [Legal History Job Aid]
    - **Level of Care** [Level of Care Job Aid]
    - **Applicant Authorization** or **LTSR Acknowledgement** if the indicated Level of Care is LTSR.

    [Applicant Authorization Job Aid] & [LTSR Acknowledgement Job Aid]

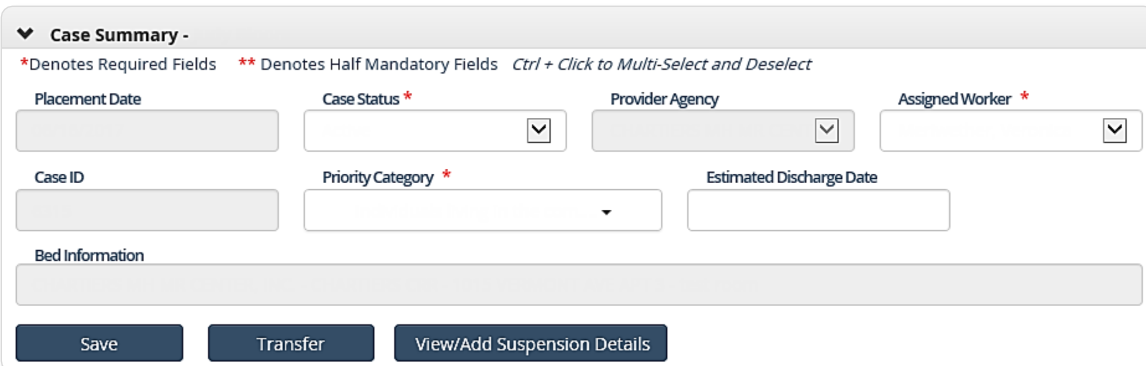
    Once a screen has been completed, the navigation icon will change from a ⊕ or ⊗ to a ✓ which indicates that the mandatory information for this screen has been entered and saved.

4. Once the Applicant Authorization/LTSR Acknowledgement has been completed, click the **Submit** button in the top right corner of the screen to submit the Referral.

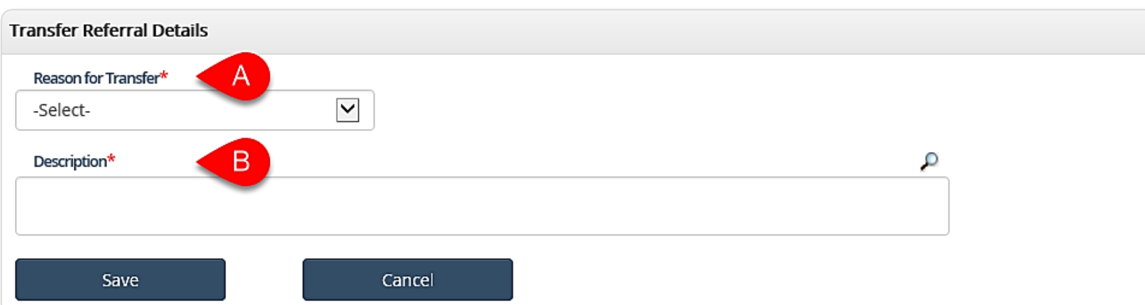
5. Once the Consumer has been accepted into a new bed placement, the current Case can then be closed.

Initiating the Referral from the Active Case

1. From the Dashboard: Locate the desired Case and click on the *Case ID* to bring the Case into focus.
   a. Click on the Case Information tile. Then click on the Summary tile.
2. Case Summary pane: Click Transfer to transfer the Consumer to another bed.



3. Complete the *Transfer Referral Details* pop-up:



   a. *Reason for Transfer*: Select the reason for transfer from the drop-down.
   b. *Description*: Enter details about the transfer.
   c. Click Save to save the information entered and initiate a transfer.
      Clicking Cancel will close the pop-up without saving the information entered and the transfer will not be initiated.
4. Synergy will automatically navigate to the newly created Referral's Individual Info screen. Information from the Case will carry over into the new Referral.

   This Referral will also appear on the user's Dashboard under Pending Referrals. Information from the Case will carry over into the new Referral.

Completing and Submitting the new Referral

1. Complete and Submit the new Referral. This includes completing the following required screens:

   - **Individual Info** [Individual Info Job Aid]
   - **Referral Info** [Referral Info Job Aid]
   - **Referral Reason** [Referral Reason Job Aid]
   - **Residential Living** [Residential Living Job Aid]
   - **Treatment History** [Treatment History Job Aid]
   - **Risk Factors** [Risk Factors Job Aid]
   - **Legal History** [Legal History Job Aid]
   - **Level of Care** [Level of Care Job Aid]
   - **Applicant Authorization** or **LTSR Acknowledgement** if the indicated Level of Care is LTSR.

   [Applicant Authorization Job Aid] & [LTSR Acknowledgement Job Aid]

   Once a screen has been completed, the navigation icon will change from a or to a which indicates that the mandatory information for this screen has been entered and saved.

2. Once the Applicant Authorization/LTSR Acknowledgement has been completed, click the **Submit** button in the top right corner of the screen to submit the Referral.

3. Once the Consumer has been accepted into a new bed placement, the current Case can then be closed.

For more information…

For assistance, please contact the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access iService, go to: https://servicedesk.alleghenycounty.us

This and other Job Aids can be found at: http://s3.amazonaws.com/dhs-application-support/index.htm or http://dhsassist.dhs.allegheny.local for internal users.