

Updated Referral Guide

Role = BHDDH Provider, BHDDH Provider Supervisor, Case Manager, or BHDDH Worker

Notes

General instructions to Receive/View a note that was shared with you and respond

- 1. **Notes** that are initially shared with you will show as a **Pending or Complete Note** on your My Work Dashboard



File

WEB FORMS	PARTICIPANTS	REMINDER: TURN OFF POPUP BLOCKERS
Web Forms Alert Notes List > Unread Alert Notes 0	State Agencies/Programs > Closed 1 In Progress 1	
	Ticklers > Ticklers 26	
	CMA/Service Provider > Clinically Eligible 2 Closed 3 Open 4	
	Notes > Complete 1 Pending 13	

- 2. From My Work dashboard, under the **Notes** section, Click **Pending** (or other status)
- 3. All Pending Notes will appear in the table. Select a Pending Note to open and view details
- 4. **Note Type** will provide information regarding the type of communication (for example, Referrals, etc.).
- 5. In the gray section, below description, will be communication between recipients.
- 6. You can respond or add to the communication in the white box labelled Note, under **New Text**.

*** **Please Note:** You are only able to add/respond to a **Pending Note**. Complete Notes will be view only.

- 7. Enter your response and then click the **Append Text to Note** bar below the New Text box.

*****Caution:** If you don't click the Append Text to Note bar, the system will not save your response.

8. This action pushes the text you added into the gray box, indicating your message has been added.

***** Please Note:** This does not save the text you appended. You need to go to **File – Save Note** to save the text you added.

9. Keep the Status as **Pending**.

*****Please Note:** Never click Confidential!

10. To add a recipient to the note, click **Lookup** under **Note Recipients**, next to **Add Note Recipient**.

*****Please Note:** Only those listed in note recipient grid with note status = Unread will receive the message. If you want the person who added you to the note to see your response, please be sure their name is listed in the Notes Recipient Grid.

*****Also,** if a recipient has marked the note as Read, then they will no longer see a Pending Note in their My Work chapter. You will need to add them again as a recipient for the note to show under Pending Notes in My Work chapter.

11. In the **Search Text** box, enter at least the first three letters of the recipient's last name

12. Click **Search** and select the recipient from the list of names

13. The recipient's name will now appear in the **Note Recipients Grid**. This grid displays all recipients that will receive the note.

14. Click **File, Save and Close Notes** ****If you don't save, the message will be lost.**

*****Please Note:**

Note By shows the individual that initially authored the note and not necessarily the person who shared the note last.

Note Date shows the date the note was originally created.

***** Providers Please Note:**

- a. To mark a note as read, open the note
- b. Click **Tools** (to the right of File), **Mark as Read and Close**

Referrals

Sending referrals

Role: CFCM or BHDDH Worker

*****Please note:** Referrals and secure communication will use a **fake/agency participant** for communication.

1. Participant with First Name = [Your Agency] and Last Name = [BHDDH or CFCM Agency Name].

- a. For example, communication between West Bay RI and BHDDH would search for participant – West Bay RI BHDDH
- b. For example, communication between Perspectives and BHDDH Case Management would search for participant – Perspectives (first name) DDCM-BHDDHCM (last name)
- c. *****Please Note:** Referrals to the FI instance of the agency, please be sure to select Agency FI. For example, communication between Fogarty FI and BHDDH would search for Fogarty FI (first name) BHDDH (last name)
2. Please **note**, a separate referral must be made for each service and to each provider agency.
3. Search for and select the **fake/agency participant**
4. Referrals are done through a note in **Notes** tab in the fake/agency participant record
 - a. Click on **Notes** Tab
 - b. Click **File, Add Note**
 - c. From **State Agency/Program** drop down, select **BHDDH/IDD/HCBS**
 - d. From **Note Type** drop down, select **Referrals**.

*****Note, there is a referral note type and referrals note type. Please be sure to ONLY USE THE REFERRALS (plural) NOTE TYPE.**

 - e. ****Note:** Residential Referrals will be sent by BHDDH Residential team only and is completed using different note type.
 - f. When sending a referral using the **Referrals Note Type** (all referrals other than residential), the **note subtype** will indicate the service the referral is for.
 - g. In the note **Description** include: [Participant Name] [Referral to *service*] [Proposed date services will start]
 - i. **If participant requires interpreter (ASL, other language), please note in Note Description.**
 - ii. If referring to **Access to Overnight Supports**, please select Community Based Services from the Note Subtype drop down and include 'Access to overnight services' in description as service.
 - h. In **Note** text box, include a brief note regarding the referral
 - i. Under **Attachment**, click **Add Attachment** to attach Referral Form [name of form = LTSS HCBS Referral Form_January 2026] and supporting documents (previous ISP/PCP, SIS Summary Report, etc.)
 - i. Click **Choose File** and select appropriate file from your desktop
 - ii. In text box next to **Description**, type the same description as entered in Note (ex., [Participant Name] [Reason for Note])
 - iii. From the **Category** drop down, select **BHDDH Other**
 - iv. Click **Upload**. You should now see the document listed under Attachments Grid
 1. To upload PDF of demographic tab, click demographic tab
 2. Click File, Print

3. Once Print page pops up, change printer drop down to Microsoft Print PDF and Click Print
4. Name the file and save it to your computer
 - a. When you've created your note, you are now able to upload this PDF as an attachment
5. Add a recipient (if the recipient isn't already showing in the **Note Recipient Grid**)
 - a. Click **Lookup** under **Note Recipients**, next to **Add Note Recipient**.
 - b. In the **Search Text** box, enter at least the first three letters of the recipient's last name (searching for provider contact for referral)
 - c. Click **Search** and select the recipient from the list of names
 - d. The recipient's name will now appear in the **Note Recipients Grid**. This grid displays all recipients that will receive the note.
 - e. **Please note, if the recipient is listed but the status shows as Read, this means the recipient will not receive the appended note on their My Work Page. You will need to add them again as a recipient for the appended note to show on their My Work page**
6. From the **Status** drop down, select **Pending** (once referral is complete, CFCM or BHDDH Worker may change **note status** to **Complete**)
7. Click **File, Save and Close Notes**
8. Once the DDO Provider receives the note, the DDO Provider will respond.
9. CFCM will respond to all referral notes once provider has indicated acceptance/denial, and the participant has accepted/denied agency.
 - a. CFCM will need to **add DDO Provider Agency contacts again** if contacts have marked the note as read.
 - b. CFCM will change status on all referral notes to **Complete** once Provider has responded and participant has selected agency.

Receiving/Responding to Referral

Role: Provider or Provider Supervisor

1. From My Work Dashboard, under the **Notes** section, Click **Pending**
2. All Pending Notes will appear in the table. Select a **Pending** Note to open and view details
3. For Referrals, **Note Type** will indicate **Referrals** or **Referral- Residential**.
 - a. When receiving **Residential Referrals**, review the information and respond to the recipient with any questions or clarification needed.
 - i. **To accept** the referral, please note acceptance in Note Text box.
 - ii. Add any other relevant notes to the Note text box.
 - iii. Add a **Note Recipient** if the recipient isn't already showing in the **Note Recipient Grid** or if the note recipient **status = Read**. Once a

- recipient has marked the note as read, they will not see the Pending Note in My Work unless the participant is added as a recipient again.
- iv. DD staff will change note subtype to **Residential Referral Acceptance** if both provider and participant accept.
 - v. **To deny** the referral, change the **Note Type** to **Residential Denial**
 - vi. **Select the reason** for the denial using the **Note Sub-Type** drop down.
 - vii. Add any relevant notes to the **Note** text menu, and add a recipient (if the recipient isn't already showing in the **Note Recipient Grid**)
- b. When receiving a **Referrals Note Type** (all referrals other than residential), the **note subtype** will indicate the type of referral placed. Review the information (including any attachments such as the Referral Form) and respond to the recipient with any questions or clarification needed.
- i. To accept referral, note the acceptance in the Note Text box along with any additional notes.
 - ii. Add a **Note Recipient** (if the recipient isn't already showing in the **Note Recipient Grid**)
 - iii. To deny the referral, change the **Note Type** to **Referral Denial**
 - iv. **Select the reason** for denial using **the Note Sub-Type drop down** menu.
 - v. Add any relevant notes to the **Note** text box, and add a recipient (if the recipient isn't already showing in the **Note Recipient Grid**)
 - vi. Leave the Note Status as **Pending (DO NOT CHANGE STATUS)**. Only CFCM or State will change status once referral is complete
 - vii. Click **File, Save and Close Notes**. ****If you don't save, the message will be lost.**
 - viii. Once you receive and respond to the referrals note using the fake/agency participant you may **mark it as read**.
 - ix. To mark a note as read, open the note
 - x. Click **Tools** (to the right of File), **Mark as Read and Close**
 - xi. **Note:** Mark as Read will allow the person communicating with you to follow up and ensure the appended note shows as a new pending note on your My Work page. If you don't Mark as Read, you will need to go back to the original pending note and continually check for a response.

Documentation of Referrals

Role: Case Manager or BHDDH Worker

1. After creating referrals through a Note in Agency Participant record, CFCM/SCW will create a case note to document efforts in **Actual Participant Record**.
2. CFCM/SCW will add Note to Actual Participant record
 - a. Click on Notes Tab
 - b. Click File, Add Note

- c. From State Agency/Program drop down, select BHDDH/IDD/HCBS
- d. Note Type = General/Other
- e. Note Subtype = N/A
- f. In Description, SCW will note [Referral Tracking+ *date of referral*]
- g. In Note text box, CFCM/SCW will note that they made a referral to [Agency] on [Date] for [Service]
- h. Note Status should be = Pending
- i. CFCM/SCW should change note Status to Complete once referral has been accepted by Provider and Participant and participant has been admitted with Provider (see section below = Admitting Participant with Provider)
- j. No Note Recipients need to be added

Note Types:

Note Type	Note Subtype	When to use	Which Participant
Referrals (note, please do not use referral (singular) note type. ONLY USE REFERRALS (plural) NOTE TYPE	*Varies – subtype will = the service	State or CFCM will use when sending a referral to your agency	Agency participant record (ex., West Bay RI BHDDH)
Referral Denial	*Varies – Subtype will = reason for denial	Provider will change Note Type from Referral to Referral Denial and select relevant subtype when denying a referral that was sent. SCW/CFCM may also change notes to Referral Denial if participant denies referral with provider.	Agency participant record (ex., West Bay RI BHDDH)
Referral – Residential	*Varies – Subtype may be = type of residential placement referral is for or	BHDDH will send residential referrals to provider. If provider and participant accept referral, BHDDH will change subtype to Residential Referral Acceptance	Agency participant record (ex., West Bay RI BHDDH)

	status of residential referral		
Residential Denial	*Varies – Subtype will = reason for denial	<p>Provider will change Note Type from Referral-Residential to Residential Denial and select relevant subtype when denying a referral that was sent.</p> <p>SCW may also change note to Referral Denial if participant denies referral with provider.</p>	Agency participant record (ex., West Bay RI BHDDH)