

CASE MANAGER QUICK SEARCH (Level 1)

All Case Managers (HCS, AAA or DDA) can access the Registry and search for a provider using a generic username = *casemanager* and password = *ipsearch*. **Level 1 access** results will display limited information/access to provider information that appears on the results list page (see sample screen shot “Level 1 Results View”).

To conduct a Level 1 Quick Search, enter in the username and password as described above; choose the link to **Provider Search** on the home page menu on the left-hand side of the home page screen under **Case Manager**.

The search does not require any identifying consumer data and does not retain a record that can be used again in the future.

To conduct a search they select:

- Clients zip code, service category, language and gender
- Type of care: routine, backup or respite
- Training, living conditions and/or pets
- Personal care tasks (limited selection)
- Time and day of the week

The case manager is required to enter their name, email address, phone number and reporting unit for tracking purposes. See screen sample, below:

(Screen Sample – Case Manager Data Entry)
-Case Manager Info-

Case Manager Name*	<input type="text"/>
Email*	<input type="text"/>
Phone*	<input type="text"/>
Reporting Unit*	<input type="text" value="[Select a Reporting Unit]"/>

Case Manager's Quick Search Page

Welcome to the Referral Registry

HCRR has worked in conjunction with ALTSA to develop this method of searching for a potential provider using the Referral Registry. The information you provide will not be saved after you leave the system. If, you would like to have the client information saved for easy access and follow up, call your local Registry Coordinator for assistance at 800-970-5456.

IMPORTANT UPDATE: Quick Search results will display only limited information and access to provider information. Provider contact and personal information is not available from this view.

Please contact your local Registry Coordinator for further assistance with using this quick search function to assist you with finding a provider.

Thank you for using the Home Care Referral Registry

(Screen Sample – Level 1 Results View)
-Referral List Result Screen, Level 1-

The matching provider list is generated by a query which matches the information you entered and the information gathered from the provider application. The results below provide general information about workers in your area that may best match your client's needs. Please note that provider contact and personal information is not available from this view.

For further assistance with finding a provider, please contact your local HCRR Coordinator or call 800-970-5456.

SAMPLE: Matching Provider List

Provider Name	Primary Language	Active Contracts	City
Rose	English	DD, HCS	Shelton
Pennee	English	DD, HCS	Lacey
Irene	English	DD, HCS	Olympia
Ana	Spanish	HCS	Olympia
Jess	English	DD, HCS	Olympia
James	English	DD, HCS	Yelm
Mary	Spanish	DD, HCS	Olympia
Kim	English	DD, HCS	Shelton

CASE MANAGER QUICK SEARCH – Level 2

Level 2 access will provide a result list with complete provider name and access to provider contact information on the results page view (see sample screen shot “Level 2 Results View”).

Level 2 access (quick search function with access to provider records as displayed on the results screen) is intended for Registry staff in order to support case managers that are attempting to search the Registry for providers.

For example: A case manager uses the Quick Search Level 1 (limited results) access to get to a list of providers. Once they view the limited results screen, they will be prompted to contact their local HCRR to get more information about the providers listed on this results screen.

- To conduct a search with Level 2 access, the HCRR Coordinator will log-in to the Registry system with their usual credentials then choose the link to **Provider Search** on the home page menu on the left-hand side of the home page screen under the navigation item labeled **Case Manager**. This screen will offer the same type of search process, except the results screen will have active links to prospective provider details and contact information so that those most suitable can be contacted.

Just as with Level 1 access, this search process does not require any identifying consumer data and does not retain a record that can be used again in the future.

To conduct a search they select:

- Clients zip code, service category, language and gender
- Type of care: routine, backup or respite
- Training, living conditions and/or pets
- Personal care tasks (limited selection)
- Time and day of the week

You will be prompted to enter the case manager’s name, email address, phone number and reporting unit for tracking purposes. See prior screen sample: “Case Manager data entry -Case Manager Info”

Case Manager's Quick Search Page Welcome to the Referral Registry

HCRR has worked in conjunction with ALISA to develop this method of searching for a potential provider using the Referral Registry. The information you provide will not be saved after you leave the system. If, you would like to have the client information saved for easy access and follow up, call your local Registry Coordinator for assistance at 800-970-5456.

Thank you for using the Home Care Referral Registry

(Screen Sample – Level 2 Results View)
-Referral List, Level 2

The matching provider list is generated by a query which matches the information you entered and the information gathered from the provider application. Referral Registry Coordinators are available to assist you. In order to determine if the providers on the matching list are available for your client, please contact a Registry Coordinator at 800-970-5456. *(Last names and phone numbers are blocked from view for purposes of this example).*

SAMPLE: Matching Provider List

Provider Name	Primary Language	Provider Phone	Active Contracts	City (click to open map)
██████████, Barbara	English	(360) ██████████	HCS	Sequim
██████████ Shirley	English	(360) ██████████	HCS	Port Townsend
██████████, Lila	English	(360) ██████████	HCS	Port Angeles
██████████, Scott	English	(360) ██████████	HCS	Port Townsend
██████████, Nicole	English	(360) ██████████	HCS	Port Townsend
██████████, Apryl	English	(360) ██████████	HCS	Port Angeles
██████████, Andrew	English	(208) ██████████	HCS	Sequim
██████████, Kaitlyn	English	(360) ██████████	DD, HCS	Port Angeles
██████████, Liu	English	(360) ██████████	DD, HCS	Sequim
██████████, Zen	English	(360) ██████████	HCS	Port Angeles

TRACKING CASE MANAGER QUICK SEARCH ACTIVITY

Once a provider search is initiated (**Case Manager Quick Search - Level 1 or 2**), a list of providers names which best match the requested query is generated (see Screen Sample – Results View).

➔ Case Managers do not have access to provider contact information via Level 1 Quick Search access. Although they are promoted to contact the Registry Coordinator for assistance it is critical that you follow-up. Their log-in information will appear on the activity list under CM Quick Search, see screen samples below:

Follow-up is triggered by the **CM Quick Search** activity in the **Consumer Activity Summary**.

(Screen Sample)

Activity	Number In Queue
<u>Verify Eligibility</u>	4
<u>Activate Consumer</u>	1
<u>Referral Follow-Up</u>	12
<u>CM Quick Search</u>	4

Consumer Activity Summary

The CM Quick Search will display the case manager name, email, phone and reporting unit **2 days** after the request. This is a prompt to call the case manager and inquire if they were able to find someone or if they need additional assistance.

Once you have contacted the case manager, click on **Close Activity** to remove the activity prompt.

(Screen Sample)

Name	Email	Phone	Date of Request	Close Activity
Cm test	Casemanager1@dshs.wa.gov	(360) xxx-xxxx	07/10/2013	<u>Close Activity</u>
Cm test	Casemanager2@dshs.wa.gov	(425) xxx-xxxx	07/18/2013	<u>Close Activity</u>
Cm test	Casemanager3@dshs.wa.gov	(206) xxx-xxxx	07/21/2013	<u>Close Activity</u>
Cm test	Casemanager4@dshs.wa.gov	(509) xxx-xxxx	07/22/2013	<u>Close Activity</u>

RECORDING CASE MANAGER EMPLOYMENT

Once the case manager informs you that the consumer was able to select and hire someone off the Registry, you will record that employment on the CM Quick Search screen.

Go to the **Provider Activities** menu on the left-hand side of the screen and select **CM Employment**. Open the screen and enter the provider name, date of hire, service area and reporting unit.

(SAMPLE SCREEN)

CM Quick Search Employment

* Indicates Required Information

Providers Hired by Case Manager

Provider Name*

Assign a Provider

Case Manager First Name*

Case Manager Last Name*

Date of Hire*

Service Area*

Reporting Unit*

Update

RECORDING CASE MANAGER EMPLOYMENT

Once recorded on the **CM Quick Search** screen, the CM Employment will then be reflected on the Employment Report Screen for the corresponding month. This record will be indicated by an asterisk next to the name of case manager which is listed in the “employed by” column. Additionally the term *CM Quick Search* will appear in the column labeled “entered via”. As with all recorded employment, it is the responsibility of the HCRR Coordinator to promptly update or delete entries in the database as potential status changes occur.

SAMPLE: MONTHLY EMPLOYMENT REPORT

Start Date	End Date	Provider	Employed By * designates Case Manager	Service Area	Entered Via	Other
07/04/2013		Provider name	*Case manager name	Pacific	CM Quick Search	Emp List Delete
07/05/2013	Currently Employed	Provider name	Consumer name	South Sound	Registry	Emp List Delete
07/04/2013		Provider name	*Case manager name	East Central	CM Quick Search	Emp List Delete
07/06/2013	Currently Employed	Provider name,	Consumer name	Pierce	Registry	Emp List Delete
07/01/2013	Currently Employed	Provider name	Consumer name	Southeast	Registry	Emp List Delete
07/22/2013		Provider name	*Case manager name	Pacific	CM Quick Search	Emp List Delete