



WorkSafeBC Provider Portal

Referrals and Cases

User Guide

(Version 5.3 2014.10.20)

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Document Revision Log

Revision Number	Revision Date	Changes Requested By	Reason for Change	Author
Version 5.0	Aug 10, 2011		Final – Stage 1	THS
Version 5.1	Apr 11, 2012		Enhancements for Portal V2.1. More details in Appendix C.	THS
Version 5.2	Nov 14, 2012		Enhancements for Portal V2.3	THS
Version 5.3	Oct 20, 2014		Enhancements for Portal through to V2.5	THS

Disclaimer

The examples presented in this document are taken from a test environment, using test data not actual claim information.

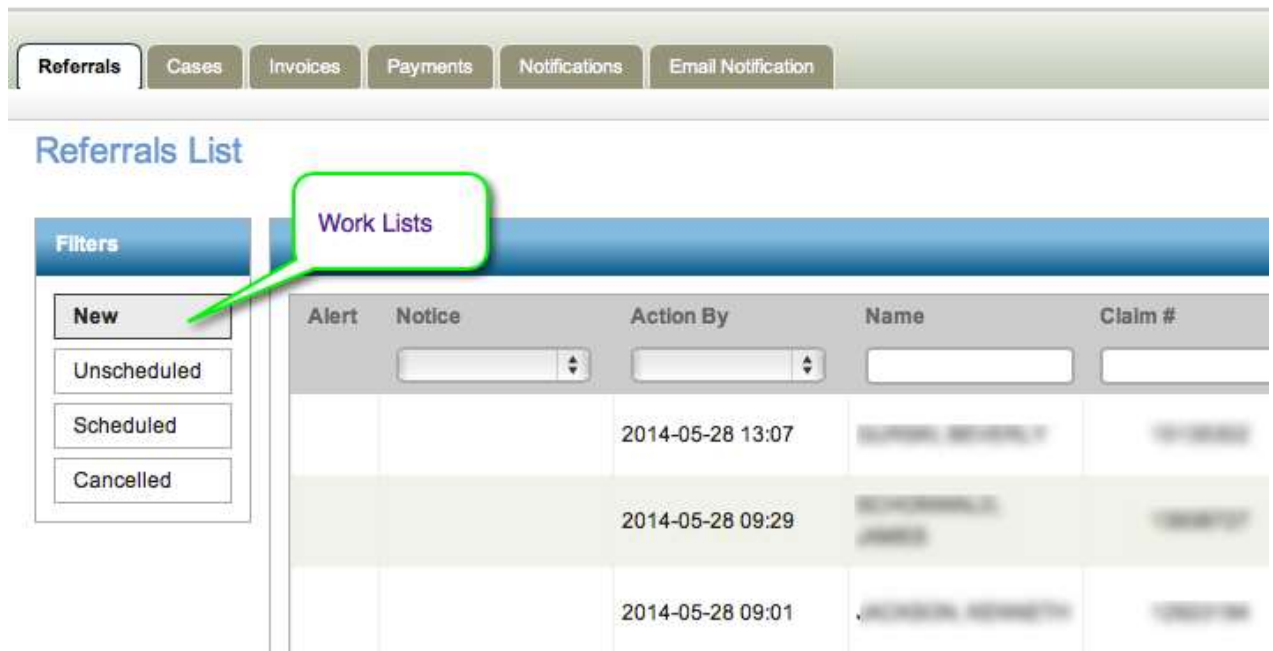
1 Introduction and Overview

1.1 Portal Navigation

- **Top Navigation Bar:** Used to navigate to the main areas of the Portal.



- **Work List Navigation:** Used to navigate between the different Work Lists within each area of the portal. Work Lists always appear on the left side of the screen.



REFERRALS AND CASES

1.2 Referrals and Cases

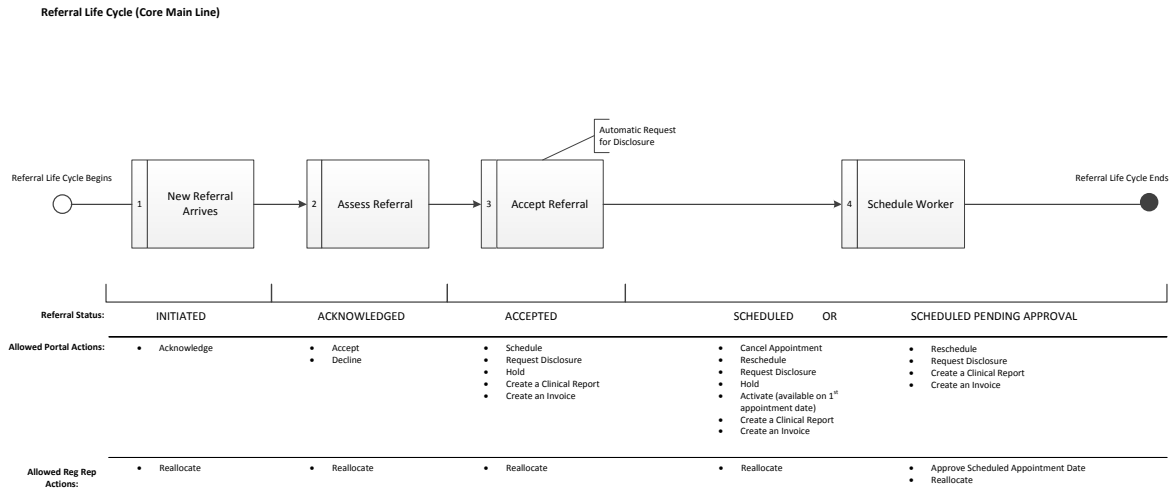
1. The system allows the Provider to access the portal to receive Referrals from WorkSafeBC and manage a Referrals full lifecycle from acknowledgement of the Referral through to discharge of the Case. Referral and Case Lifecycles are outlined in more detail in section 2.
2. The process is kept as simple and as straightforward as possible in part to minimize the degree of change and complexity.
3. The system does not enforce contractual obligations. Providers must be aware of contract specifics and requirements and use this awareness to guide their activities in the Portal.
4. User can only see Referrals and Cases for the Clinic Work Location(s) they are assigned access to in the portal.

2 Business Process Overview

1. Life cycle of a referral – showing major events and associated states and statuses. (Note – please see below and Appendix B).
2. Core main line process – outlines the key steps and workflow.
3. Exceptions – processes within and between the different states/statuses.
4. Process actions matrix – allowable actions, depending on the current status of a Referral or Case:
 - Discuss how to use within each context
 - Show the associated state transitions or events
5. Exception management tracking and explanation:
 - Show the exceptions matrix.
 - Discuss examples of the classes, types and reasons along with comments; include class, types and reasons defined by Providers.
6. Key definitions including explanation of Referral and Case status, and relationship of these states to each other.

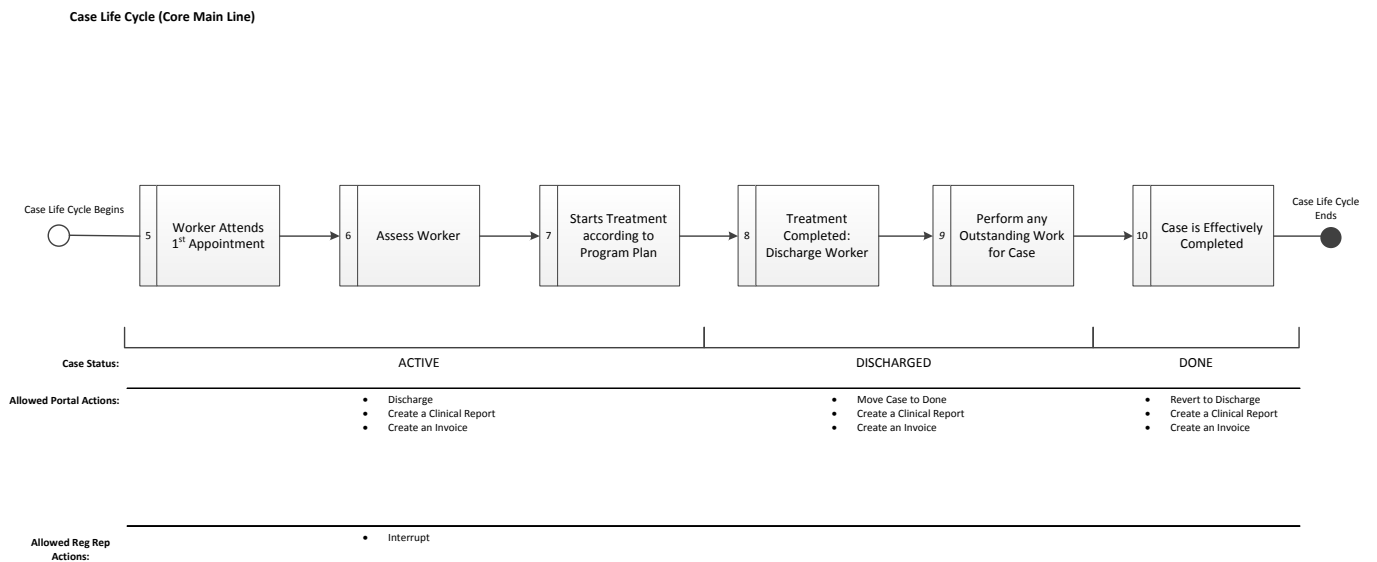
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2.1 Referrals Lifecycle



See Appendix B for full size version of the Referrals Life Cycle.

2.2 Cases Life Cycle



See Appendix B for full size version of the Cases Life Cycle.

3 Functions and Features

3.1 Introduction

The key functions and features are listed below followed by specifics and examples for each:

- Work Lists
 - Referrals Work Lists
 - Cases Work Lists
- Onscreen Notification Elements and Alerts
- Preview Panel
- Referral Details Screen
 - Referral Header
 - Claim Information
 - Summary Panel
 - Action Drop-down List
 - Action Panel
 - History Panel
 - Worker Requires Travel
 - Worker Requires Interpreter
 - Request for Disclosure
- Request for Referral
- Referral Search
- Email Notification Management

REFERRALS AND CASES

3.2 Work Lists

Work Lists provides an overview of all Referrals and Cases within a particular state of the business process.

- Work Lists are sorted so that the Referrals or Cases requiring the most immediate attention are positioned at the top of the list.
- Work Lists may be filtered by different columns:
 - Most of the columns support filtering to provide easy access to a subset of information. The filters are located at top of each column.
 - Multiple filters may be applied to a single Work List.
- Selecting a Referral or Case in any Work List (one mouse-click) will open the corresponding Preview Pane directly below the Work List

The screenshot shows the 'Referrals List' interface. At the top, there is a navigation bar with tabs for 'Referrals', 'Cases', 'Invoices', and 'Payments'. Below this, the 'Referrals List' title is displayed. A left-hand navigation panel contains filter options: 'New', 'Unscheduled', 'Scheduled', and 'Cancelled'. The main area shows a table of referrals with columns: Alert, Notice, Action By, Name, Claim #, Program/Service, and Location. The table contains four rows of data. Callouts provide the following information:

- Top navigation bar:** is used to access Referrals or Cases Work Lists.
- List filters:** are used to quickly locate Cases or Referrals within a Work List.
- Left navigation panel:** is used to access predefined Work List filters.
- Work Lists:** may list Referrals or Cases for one or more Clinic Location.

Alert	Notice	Action By	Name	Claim #	Program/Service	Location
		2011-08-01 18:23	VANROSSUM, NANETA	11975886	OR1	Burnaby
		2011-08-01 14:03	VANROSSUM, NANETA	11975886	OR1	Burnaby
		2011-08-01 14:03	VANROSSUM, NANETA	11975886	OR1	Burnaby
		2011-08-01 12:00	MASSAR, TADAO	88089772	FCE	Nanaimo

REFERRALS AND CASES

3.2.1 Referral Work Lists

Referral Work Lists are accessible from the Referrals tab on the top navigation bar

Referral Work Lists are organized in four different views:

- **New** – Referrals that had arrived in Portal and not yet been accepted.
- **Unscheduled** – Accepted Referral that are pending scheduling.
- **Scheduled** – Referrals that have a first appointment date scheduled and are awaiting start of treatment.
- **Cancelled** – Referrals that have been cancelled by WorkSafeBC, or Request for Referrals that have been rejected.

Referrals List

Referral Work Lists are accessed from the Referrals tab.

Filters

New

Unscheduled

Scheduled

Alert	Notice	Action By	Name	Claim #
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

REFERRALS AND CASES

3.2.2 Cases Work Lists

Cases Work Lists are accessible from the Cases tab on the top navigation bar.

Cases Work Lists are organized in three different views:

- **Active** – Active Cases represent Referrals that have transitioned to delivery of care. Active Cases Work List will display all Cases that are:
 - Active – The Worker is in treatment.
 - Interrupted – Worker treatment cannot continue for the time being.
 - Closed by WorkSafeBC – Worker treatment was terminated before its expected completion.
- **Discharged** – Discharged Cases represent Cases where the Worker completed the treatment plan and has been discharged by the Provider.
- **Done** – The Done Work List is used essentially to archive a Case.
 - Cases may be archived when all activities associated to the Case has completed.
 - For example, the Worker has been discharged and all associated invoicing and reporting has been completed.

Referrals **Cases** Invoices Payments

Cases List

Case Work Lists are accessed from the Cases tab.

Active Cases: 10 totals

Alert	Notice	1st Appt Date	Name	Claim #
<input type="text"/>	<input type="text"/>	<input type="text"/>		

REFERRALS AND CASES

3.3 Onscreen Notification Elements and Alerts

Onscreen notification elements and alerts are used to indicate when a Referral or Case is in a state of exception, or requires special attention.

Examples of exceptions include:

- Referral is on Hold
- Case has been Closed
- Contact Claim Owner before scheduling the Worker
- Change in status that the Provider may not be aware of. For example, when entitlement has been cancelled.

Onscreen notification elements appear as:

- Color notification bars
- Graphical icons
- Notification text

The screenshot displays a web application interface for managing referrals. On the left, a 'Filters' sidebar includes buttons for 'New', 'Unscheduled', 'Scheduled', and 'Cancelled'. The main area shows a table of referrals with a blue header bar indicating 'Cancelled: 9 totals'. The table columns are: Alert, Notice, Cancelled On, 1st Appt Date, Name, Claim #, Program/Service, and Location. Four rows are visible, each with a red 'X' icon in the 'Alert' column. Callouts explain that these icons appear in Work Lists, Referral Headers, and Referral Details screens. Below the table, a detailed view for 'BANDUCCI, GABORS' is shown, including personal and referral information. A pink notification bar at the bottom states 'Cancelled Date: Jul 27, 2011' and 'Call Claim Owner if additional information is required'. A 'View Details' button is located in the bottom right corner.

Alert	Notice	Cancelled On	1st Appt Date	Name	Claim #	Program/Service	Location
	Cancelled	2011-07-27		BANDUCCI, GABORS	10114255	Pain	Vancouver
				RASTAD, VAN	10094858	Pain	Vancouver
	Cancelled	2011-07-25		FARSANG, RASPAL	12012471	Pain	Vancouver
	Cancelled	2011-07-27		LN CMS OUTAGE 2, FN CMS OUTAGE 2	15581543	Pain	Vancouver

BANDUCCI, GABORS
 D.O.B: Aug 2, 1962 (48) Female
 PHN: 9630618757
 Referral auth #: A0600932377
 Referral status: Cancelled

Program/Service: Pain
 Location: Vancouver
 Claim #: 10114255
 Claim Eligibility Status: [unclear]

Cancelled
 Date: Jul 27, 2011

Call Claim Owner if additional information is required

What do you want to do?
[View Details](#)

REFERRALS AND CASES

3.4 Preview Pane

The Preview Panel provides a summary of the most important information related to a Referral or Case.

- The Preview Pane appears at the bottom of a Work List when a row in the Work List has been selected.
- Information displayed in the Preview Pane includes:
 - Worker demographics and contact details
 - Claim Owner information
 - Referral and Claim status
 - Link to the WorkSafeBC Referral Form PDF

Cases List

Active Cases: 10 totals

Alert	Notice	1st Appt Date	Name	Claim #	Program/Service	Location
		2011-07-25	JAREMA, HARTINDER	00671546	Pain	Vancouver
		2011-07-25	ZAPAROZAN, DARLINDA	00671636	Amputee	Langley
⊗	Closed	2011-07-22		012471	Amputee	Langley
⊗	Closed	2011-07-22		258249	Amputee	Langley

ZAPAROZAN, DARLINDA

1964 (47) Male
2301
#: A0600931273
#: ACTIVE

Program/Service: Amputee
Location: Langley
Claim #: 00671636
Claim Eligibility Status: Allowed

What do you want to do?
[View Details](#)

Contact Info | **Address**

604-7289572 Home (primary)

Referral | **Claim Owner**

Claim Date : Mon Feb 21, 2000
Referred : Mon Jul 25, 2011 4:16
Referral Form : [View PDF](#)

Preview Pane includes Referral Header including tabbed section.

Row must be highlighted (grey) in Work List to view Preview Pane.

Preview Pane includes link to open and view Referral Details screen.

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3.5 Referral Details Screen

The Referral Details screen provides detailed information related to a Referral or Case. The Referral Details screen includes:

- Referral Header
- Claim Details
- Action Panel
- Summary Panel
- History Panel

The screenshot shows the 'Details' page for a referral. It is divided into several sections:

- Referral Header:** Contains patient information for JAREMA, HARTINDER, including Date of Birth (Oct 31, 1959), PIN (9439567451), Referral Auth (A0600931428), Referral Status (ACTIVE), Program/Service (Pain), Location (Vancouver), Claim Number (00671546), and Eligibility Status (Allowed).
- Contact Info:** Lists Home (778-3974570), Cell (604-3974570), and Home (604-3974570) numbers.
- Referral / Claim Owner:** Shows Claim Date (Fri Feb 4, 2000), Referred (Mon Jul 25, 2011 5:32), and a link to View PDF.
- Action Panel:** Features a dropdown menu set to 'discharge the worker'. Below it, a 'Discharge' action is highlighted with a callout: 'Action to be performed in Action Panel.' Other buttons include 'Create Report', 'Create Invoice', and 'Refresh Data'.
- History Panel:** A list of actions performed on the referral, such as 'Active via the Activate action', 'Scheduled via the Schedule action', 'Accepted via the Accept action', and 'New via the Assign action'.
- Claim Details:** A sidebar menu with expandable/collapsible sections: Claim Details, Worker Information, Injury Information, WorkSafe BC Contacts, and Referral Information.

Callouts in the image identify these sections: 'Referral Header', 'Action Drop-down List', 'Action to be performed in Action Panel.', 'History Panel', and 'Claim Details sections are independently expandable / collapsible.'

REFERRALS AND CASES

3.5.1 Referral Header

The Referral Header provides a summary of the most important information related to a Referral or Case so that it is easily accessible and can be viewed quickly.

- Displays the same information as in the Preview Pane.
- Information displayed in the Referral Header also appears in sections under Claim Details.

ZAPARUZAN , DARLINDA			
Date of Birth	May 10, 1964 (47) Male	Program/Service	Amputee
PHN	9569622301	Location	Langley
Referral Auth	A0600931273	Claim Number	00671636
Referral Status	ACTIVE	Eligibility Status	Allowed

Contact Info	Address	Referral	Claim Owner
Home 604-7289572		Claim Date : Mon Feb 21, Referred : Mon Jul 25, 2011 Referral Form : View PDF	

[Link to WorkSafeBC Referral Form PDF](#)

REFERRALS AND CASES

3.5.2 Claim Details Panel

The Claim Details Panel provides additional information about the Referral and the associated Claim

- Information in the Claim Details Panel includes:
 - Claim number
 - Claim eligibility status
 - Worker demographics
 - Worker contact information
 - Worker injury details
 - WorkSafeBC contact information
 - Referral details (most of which appears in the Referral Header)

The screenshot displays the 'Claim Details' panel for a worker named ZAPAROZAN, DARLINDA. The panel is organized into sections that can be expanded or collapsed. The 'Worker Information' section is currently expanded, showing personal and contact details. A callout box highlights the 'Interpreter required' field, which is set to 'false'. Below this, there are two mailing addresses. At the bottom, three more sections are visible: 'Injury Information', 'WorkSafe BC Contacts', and 'Referral Information', each with a plus sign icon indicating it can be expanded. A callout box points to these icons, stating that sections are independently expandable and collapsible.

Claim Details		All +
Worker Information -		
ZAPAROZAN , DARLINDA		
Date of birth	May 10, 1964 (47)	Home 604-7289572
PHN	9569622301	
Interpreter required	false	Mailing Address : 8389 164 ST SURREY BC V4N1E3
Preferred Language	English	Mailing Address : 21882 MASKED AVE SURREY BC V4N1E3
Injury Information +		
WorkSafe BC Contacts +		
Referral Information +		

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3.5.2.1 Worker Temporary Address and Phone Number

In addition to the worker contact information on file at WorkSafeBC, there may be additional worker address or worker phone number information made available in the portal that is labeled 'Temp'.

Temp addresses and/or phone numbers are present when WorkSafeBC Registration Reps find other contact information that may be more applicable to the worker in regards to the Referral, or that may be more recent for the worker.

Temp addresses and phone numbers are made available to Providers as additional means of contacting the worker.

- If available, the Temp address or phone number will be shown on the Contact Info and Address tabs on the Referral Header.
- Temp information, when it exists, will also be available in the Claim Details Panel.

The image shows two side-by-side screenshots of the WorkSafeBC Provider Portal interface. The left screenshot shows the 'Contact Info' tab selected, displaying a list of temporary phone numbers and a home phone number. The right screenshot shows the 'Address' tab selected, displaying a temporary address and a mailing address.

Tab	Field	Value
Contact Info	Temp. (manual)	1 604-251-6329
	Temp. (manual)	1-604-251-6329 x3044
	Temp. (manual)	604-251-6329
	Home	604-1184732 (primary)
Address	Temp. (manual) Address :	2888 Triumph Street Vancouver BC Canada V5M3K6
	Mailing Address :	306-222 TEMPLETON DR N VANCOUVER BC V5L3E4

3.5.3 Action Drop-down List

The Action Drop-down List provides a list of allowable actions that the user can perform, depending on status of the Referral or Case open on their screen.

- Different status will allow different actions to be performed.
- When the user selects an action from the drop-down list, different information will appear in the Action Panel to guide the user's next step(s).

The image shows a screenshot of the WorkSafeBC Provider Portal interface. A dropdown menu is open, showing a list of actions: 'Choose action', 'put referral on hold', 'request disclosure', and 'schedule the worker'. A callout box points to the dropdown menu with the text: 'Available actions in the drop-down list are determined by the current status of the Referral/Case.' Below the dropdown menu, there are buttons for 'Create Report', 'Create Invoice', and 'Refresh Data'.

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3.5.4 Action Panel

Action Panels provides the functionality to fully complete a process end to end, including any associated actions, for example:

- When scheduling or re-scheduling an appointment, the action panel supports the required functionality for scheduling the appointment, as well as related functionality if the appointment date being scheduled is outside the window of tolerance.
- The 'travel assistance' check-box provides the functionality to notify WorkSafeBC that a Worker may require travel assistance even if the Worker is not travelling an extended distance.
- When accepting a Referral, in addition to updating the Referral status to Accepted, the Accept Referral action will also trigger a Request for Disclosure to be automatically submitted on behalf of the Provider.

The screenshot shows a web interface for scheduling a worker. At the top, there is a dropdown menu labeled "I want to:" with "schedule the worker" selected. Below this is a section titled "1st Appointment" containing a date input field, a time input field set to "9:00", and an AM/PM dropdown. A checkbox labeled "Notify WSBC if worker requires travel assistance" is located below the appointment fields. The "Submit" button is highlighted with a green circle. A callout box points to the "Submit" button with the text: "The Action Panel will change to support the end-to-end process of the selected action." At the bottom of the interface, there are three buttons: "Create Report", "Create Invoice", and "Refresh Data".

The Action Panel that will display is dependent on the action the user selects from the Action Drop-down List (excluding the Invoicing and Reporting commands).

Key actions for Referrals:

- Accepting or Declining a Referral
- Scheduling or Rescheduling the first appointment date
- Cancelling the first appointment date
- Putting a Referral on Hold when a problem arises; or, removing the hold when the issue has been resolved.
- Requesting Disclosure
- Invoicing
- Clinical Reporting

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Key actions for Cases:

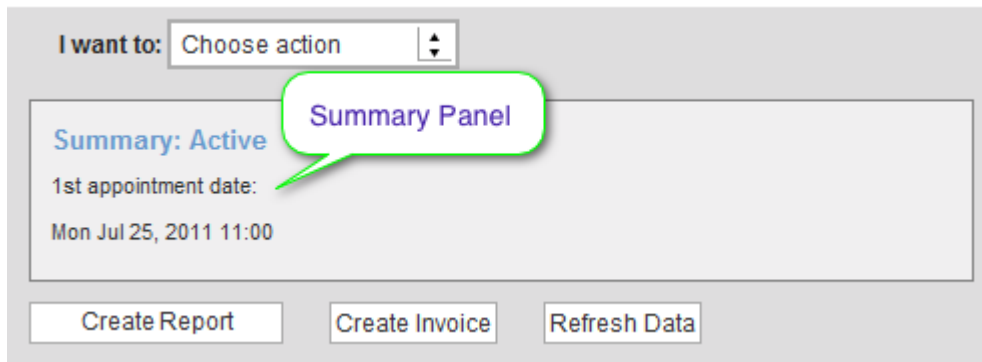
- Transitioning a Referral to an Active Case
- Discharging the Worker
- Moving a Case to the Done List
- If Worker had been discharged, moving a Case from the Done List back to the Discharged Work List – reverting the status of the Case from Done to Discharged.
- If the Case had been Closed by WorkSafeBC, moving a Case from the Done List back to the Active List – reverting the status of the Case from Done to Closed.
- Invoicing
- Clinical Reporting

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3.5.5 Summary Panel

The Summary Panel is positioned on the top right side of the Referral Details screen and displays the current status of a Referral or Case, and will include relevant details such as:

- First Appointment Date
- Discharge Date
- Special notices or indicators



I want to: Choose action

Summary: Active

1st appointment date:
Mon Jul 25, 2011 11:00

Create Report Create Invoice Refresh Data

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3.5.6 Referral History Panel

The History Panel displays the Referral/Case lifecycle beginning at the point at which the Referral is allocated to the Provider.

- The History Panel captures all actions and state transitions associated to the Referral, including:
 - When the Referral appointment date was submitted
 - When a Request for Disclosure was submitted
 - When a Referral was put on hold

History

Jul 25, 2011 8:18:24 PM **Active** via the **Activate** action

Jul 25, 2011 8:18:16 PM **Scheduled** via the **Schedule** action

Jul 25, 2011 8:18:06 PM **Accepted** via the **Accept** action

Jul 25, 2011 8:18:06 PM **Accepted** via the **RequestForDisclosure** action

Jul 25, 2011 8:16:46 PM **New** via the **Acknowledge** action

Jul 25, 2011 8:16:46 PM **New** via the **Assign** action

WSBC Admin

Referral Status

Action Performed

User who performed Action

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3.5.7 Report Submission History

The Report History Panel displays records of any report that has been submitted for the Referral. The History panel captures:

- Report Form ID
- Provider’s Report Information:
 - Progress report/Module number
 - Report number
 - Report date
- Date of service
- Filename(s) of the attachment(s) submitted
- Date and time the report was submitted through the portal
- Display name of the portal user logged in at the time of submission
-

Report History -

Nov 13, 2012 1:57:25 PM

WorkSafeBC Form ID:	BSRGRTWP
Report #:	T9955
Report Date:	Nov 13, 2012
Date of Service:	Nov 13, 2012
Progress Report #/Program	TEST1
Module #:	
Submitted By:	Mary Rtest
Report PDF:	Report Attachment 1.pdf More

3.5.8 Invoice Submission History

The Invoice History Panel displays any invoices that have been submitted to WorkSafeBC for the Referral. Invoices in draft form will not be displayed in this panel.

Invoice History -

Apr 10, 2012 2:52:41 PM

Invoice #:	Portal012	Invoice details
Invoice Date:	Apr 10, 2012	
Amount:	\$5,401.00	
Submitted By:	Anne Atester Atester	

Date and time of submission

User who submitted Invoice

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3.6 Request for Referral

Request for Referral provides the functionality that allows a Provider to submit a Request for Referral through the portal.

- Must be for a specific Worker and a specific Claim.
- Must also be for a specific Clinic Work Location and a specific contracted Program or Service deliverable by the specified Clinic Work Location.
- User can only select a Clinic Work Location they are assigned access to in the portal.
- User can only select contracted Programs which have been authorized and enabled in the portal by WorkSafeBC for the “Request for Referral” function.

3.6.1 Claim Lookup

The Claim Lookup function is used to locate the Claim that the Provider wishes to submit a Request for Referral for. It is the first step in the process.

- In order to lookup a Claim, one of these two combinations of information must be provided:
 - Claim # and Last Name
 - Claim # and Date of Birth

If a matching claim is found, it will display. The Request Referral command will be available if the Claim Status is Allowed or Pending.

Found claim			
NASSOLO , AADEL			
Date of Birth	Mar 24, 1954 (57) Female	Injury Date	Jul 15, 2002
PHN	9465536769	Claim Number	02258249
Claim Status	Allowed		

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3.6.2 Request for Referral Action Panel

The Request for Referral Action Panel provides the functionality to submit the Request for Referral to the Claim Owner:

The screenshot shows the 'Request for Referral' form for a worker named NASSOLO, AADEL. The form includes the following fields and callouts:

- Worker Information:**
 - Name: NASSOLO , AADEL
 - DOB: Mar 24, 1954 12:00:00 AM
 - Claim #: 02258249
 - PHN: 9465536769
 - Eligibility Status: Allowed
- Referral Details:**
 - * Location: Vancouver (Callout: Must be for a specific Claim)
 - * Program/Service: HAND (Callout: Must be requested for a specific Clinic Location)
 - Priority: Standard (Callout: Must be a contracted program delivered at the selected Clinic Location)
 - Treatment Goals: (Empty text area)
 - Expected Outcomes: (If you have scheduled or treated the worker, please include the date and details in your comments)
- Buttons:** Submit and Clear

In order to submit a Request for Referral, the following information must be provided:

- Clinic Work Location
- Contracted Program
- Treatment Goals
- Expected Outcomes

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Note, only contracted Programs or Services that have been enabled for the “Request Referral” function in the portal may be selected.

- Programs/Services that have been enabled will appear in the dropdown list for the user to select from.
- Programs/Services that have not been enabled for the “Request Referral” function in the portal will appear listed as unavailable next to the dropdown list.

The screenshot shows a form titled "Referral request details" with the following fields:

- * Location:** A dropdown menu currently showing "- Coquitlam".
- * Program/Service:** A dropdown menu with "Choose..." and "OR2" as options. A red callout box points to this menu with the text: "Contracted Programs/Services for the specified location that can be requested through the portal."
- Priority:** A field that is currently empty.

Below the Program/Service dropdown, the text "Unavailable for selection: COT, OR1, RTW Program - Assessment" is displayed. A red callout box points to this text with the text: "Contracted Programs/Services for the specified location that cannot be requested through the portal."

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3.7 Referral / Case Search

The Referral / Case Search function is a global function that allows a Provider to search for any Referral or Case available in the portal.

- Providers may search by worker name or claim number.
- All matching Referrals or Cases will be returned, regardless of status.
- Search results will only return Referrals and Cases for the Clinic Work Location(s) the user has been assigned access to in the portal.

The search function supports partial matching. For example, if the user enters “ans”, the portal will return all Referrals and Cases the contain “ans” anywhere in the worker’s name or claim number.



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3.8 Email Notifications

The portal provide functionality to support email notification to Providers for key Referral related events. There are three event types supported:

- **New Referral** – Notifies the Provider a new Referral has arrived in the portal.
 - Applies only to Referrals initiated by WorkSafeBC.
 - Does not apply to Provider Requested Referrals that have been Approved (or Denied).
- **Accepted Referral Warning** – Notifies the Provider action is required on a specific Referral or the Referral will be reallocated to another Provider.
- **Accepted Referral Cancellation** – Notifies the Provider that a Referral that they had previously Accepted has been Cancelled by WorkSafeBC.

The screenshot displays the 'Email Notification Configuration' page with three location-specific sections:

- Abbotsford:** The 'Email Addresses' field is empty. Notification checkboxes for 'New Referral', 'Accepted Referral Warning', and 'Accepted Referral Cancellation' are all unchecked. A callout box states: 'Notifications will not be sent for locations that do not have at least one email address listed.'
- Burnaby:** The 'Email Addresses' field contains 'testuser@***clinicname.com' and 'admin@***clinicname.com'. All three notification checkboxes are checked. A callout box states: 'All selected notification types will be sent to all of the email addresses specified in the list.'
- Coquitlam:** The 'Email Addresses' field contains 'admin@***clinicname.com'. All three notification checkboxes are checked. A callout box states: 'Email notifications options and recipient email address(es) may vary for each location.'

Additional callouts include: 'Changes must be saved.' pointing to the 'Save' button in the Burnaby section, and 'Test to confirm email address is valid.' pointing to the 'Test' button in the Coquitlam section.

REFERRALS AND CASES

3.8.1 Managing Email Notifications

Email notification settings are managed by Providers through the portal. Access email notification settings by clicking on the Email Notifications tab on the top navigation bar.

- Providers can manage email notifications for all Work Locations they have been assigned access to in the portal.
- Email notifications for each Work Location is independent of any others.
- Email notification settings must be **saved** for **each Work Location** by clicking on the Save command associated to each location.
 - If the Save command is not clicked, any changes will be lost.
 - It is recommended to test all email addresses entered to confirm notifications can be received. To do this, enter the recipient email address(es) and then click the 'Test' button. Check email inbox for test message received.
 - If no test message was received, verify the email address is correct; test with another email address.
- Each Work Location may be assigned zero, one or more than one recipient email address.
 - Enter each email address on its own line.
 - If no email addresses are entered, no notifications will be sent out.
- Each Work Location may receive zero, one or more than one notification type. Select all that apply.
 - If no selection is made, no notifications will be sent out.

4 Usability Suggestions: Factors & Considerations

From a usability perspective, we list a number of considerations below.

1. Accessing the portal – throughout the day
2. Portal security:
 - Login considerations
 - Single Provider Organization context
 - Display of currently logged in user's credentials
 - Username
 - Provider Organization Context
 - Changing the Provider Organization context while in the portal
 - Any user with access to the portal has the ability to search for invoice and payment information for the Clinic Work Locations they are associated to
 - The importance of logging out
 - Accessing the portal on public computers – or public wi-fi connections
 - Session time-outs – how often will the user need to login
 - The importance of not sharing user login credentials
3. Time clocks and acknowledgements:
 - 24 hour expiration window
 - Impact of not acknowledging a Referral within this timeframe in the portal.
 - Displayed in the Action By column in the New Referrals Work List.
 - Accepted referral scheduling window
 - Governed by contract and Provider incentive.
 - Impact of in action on a Referral within this timeframe in the portal.
 - Referrals will appear in the Cancelled Referrals Work List.
 - Displayed in the Action By column in the Unscheduled Referrals Work List

REFERRALS AND CASES

- Scheduling within the window of tolerance
 - Measured from the point that the Referral was Acknowledged (Referral Acknowledge Date)
 - Referral Acknowledge Date is not the date/time the Referral was allocated to a Provider and delivered through the portal. It is the date/time that the Referral is first clicked on by a Provider User in the Referral “New” filter.
 - If the Referral had initially been allocated to another Provider, there may be a difference of one or more days between the Referral Date and the date it was delivered through the portal to the current Provider.
 - Acknowledged Date is in the context of the current Provider.
 - What scheduling outside the window of tolerance really means
 - Purpose for the approval process
 - Impact on Provider’s ability to continue with the Referral
 - Provider’s cannot transition the Referral to an active Case until it is approved by the Reg Rep
 - If Reg Rep is not processing the approval soon enough – Provider will need to contact Reg Rep to request they approve scheduled date so they can move it to Cases
 - Notices displayed in the Notifications column in Work Lists
 - Display Approved if a Scheduled Pending Approval has been Approved and is now in a status of Scheduled
4. Holds – discussions between Provider and Reg Reps:
- Holds (Referrals) vs. Interrupts (Cases)
 - Provider can put a Referral on hold:
 - Provider is able to remove a hold if they can resolve the issue on their own
 - Provider must move the Referral off of hold in order to continue with the Referral (i.e. move to active case)
 - Provider cannot put a Case into interrupt – and must call Reg Rep
 - Provider cannot remove a case from status of interrupt, they must ask the Reg Rep to do this
 - Cancellations (Referrals) vs. Closed (Cases)
 - No two-way communication in Portal (stage 1), therefore verbal communication may still be required for certain circumstances

REFERRALS AND CASES

5. Where am I – see summary material above
6. Special considerations – Holds, Cancellations, etc.
 - Cancellations may occur as the result of the Referral being reallocated to another Provider, or the entitlement being cancelled
 - Provider will see both as Cancelled
 - Holds – see above.

5 Organizing Your Work

5.1 Managing Referrals and Cases – Practices and Procedures

5.1.1 Managing timeliness

See Time clocks and acknowledgements in section 4.

- Referrals past their scheduling window
 - Governed by contract and performance requirements from WorkSafeBC
 - Referral is in Accepted status for extended period of time
 - Referral will be reallocated or cancelled if action is not taken (i.e., schedule the worker)
 - If “Accepted Referral Warning” email notifications is enabled, Provider will receive email notification prompting them to take action to prevent Referral reallocation or cancellation.
 - If action is not taken, and referral is reallocated or cancelled, Referral will appear in Cancelled Work List
- Differences between what the contract says and what the portal says
 - Portal does not enforce contractual obligations
 - Provider must still be aware of contract specifics and use this awareness to guide their activity in the Portal
- Window of tolerance (WOT)
 - Defined as 2.5 times the 3-5 day window, depending on the Program
 - Measured from the time the Referral is Acknowledged by the Provider in the Referral “New” filter list, NOT the time that it is allocated to the Provider – an important distinction
 - Will not impact Providers that are receiving the Referral as the second, third, fourth allocated Provider
- Scheduling out of tolerance – normal
 - Scheduling out of tolerance – when the provider has challenges in scheduling the worker
 - WOT is measured from the date the Referral is Acknowledged.
 - Date Acknowledged is within context of current provider

REFERRALS AND CASES

5.1.2 Managing the workflow

Discuss key points of managing a referral through its core main line states – from New to Scheduled

5.1.3 Managing exceptions

- Providers can put Referrals on Hold
- Providers cannot put Cases on Interrupt, only the Reg Rep can do this
- Use of class, type and reason codes
 - For Holds
 - For Declines
 - For Rescheduling
 - For Cancelling Appointment
 - Captured in history panel for future reference
 - Scheduling outside the Window of Tolerance

5.2 Monitoring Work Lists

5.2.1 General guidance

- Work Lists are sorted so that the Referrals or Cases requiring most immediate attention appear at the top of the lists. Typically based on Action By date, or First Appointment Date
- Single click required on row to open the Preview Pane
 - Must use View Details link in Preview Pane to open the Referral or Case details
- Use Work List filters to focus on specific types of Referrals or Cases
- Use global Referral / Case Search to locate a specific Referral or Case (by Worker name or claim number)
- Once a Referral or Case has transitioned to another Work List, it cannot be transitioned back (with some exceptions). For example:
 - An Accepted cannot be Declined
 - An Active Case cannot be moved back to the Scheduled Referrals Work List
 - A Discharged Case cannot be moved back to the Active Cases List

REFERRALS AND CASES

5.2.2 Exceptions

- Cancelled referrals:
 - A Referral that has been reallocated to another Provider
 - A Referral where the entitlement has been cancelled
 - Cancelled vs. Closed (Cases)
 - The importance of maintaining accurate and timely information in the Portal, such as ensuring that the first appointment date that is entered in the Portal is accurate and updated immediately in the event of any change
 - Impacts invoicing and reporting
 - May have an impact in the event of entitlement cancellation and/or reallocation of Referral and Provider's ability to then invoice or report if treatment has already begun and they did not update the first appointment date to accurately reflect this
- Communications between Reg Rep and provider and also appropriately with the Worker
 - Responsibility is with Provider and WorkSafeBC to inform the Worker of any scheduling or status changes to their Referral or Case
 - Responsibility is with the Worker to coordinate travel requirements with Claim Owner in the event of a change in first appointment date

5.3 Change Management Considerations

5.3.1 Business process change and information availability

- Moving from paper to electronic invoices and associated information:
 - Review Referral Form for specific objectives and services requested
 - May require dual data entry for some Providers (their own system)
 - No import functionality; limited export functionality
 - Portal invoices vs. paper submitted invoices; how they display differently in the portal
- Electronic referrals provide automatically:
 - Electronic information available any time
 - Related Disclosure documentation is still being delivered by mail on CD (or whatever)
 - Ability to request Disclosure package at any time through the portal
 - First request is automatic

REFERRALS AND CASES

5.3.2 Automated system functions

- Prepopulating the Referrals and Cases
 - The Portal will retrieve the most current Claim information from CMS when the Referral is delivered to the Provider through the Portal
 - Provider must use the Refresh button on the Referral Details screen to refresh the Claim information coming from CMS
 - The information in the Referral Header may not update from CMS when the Refresh button is clicked, so Provider should verify with information in Claim Details section
 - For example, Claim Eligibility Status may not update in the Referral Header
- Prepopulating the invoice with known data:
 - Portal will populate the invoice with data that is accurate at the time the Invoice is created
 - This data cannot be refreshed after the Invoice is created, and therefore will not reflect any changes from that point forward
 - A new invoice must be created if the information must be updated
- A cancelled referral before acknowledged status
 - A Referral that is Cancelled before it is acknowledged will disappear from the Portal
 - A Referral that is Cancelled after it is acknowledged will appear in the Cancelled List
 - A Referral that is Cancelled after the Provider has Accepted the Referral should have a verbal communication from the Reg Rep as well – TBD by WorkSafeBC
 - If the Provider has email notifications enabled, they will receive an email to inform of cancelled Referrals.

5.3.3 Workarounds for any limitations and/or constraints

- Must open Referral Details screen to perform any actions
- Cannot transition a Referral back at certain points
- Important to maintain accurate information in the portal (i.e. first appointment date, transitioning to ACTIVE once the Worker has shown up and treatment begins)
- There's more – but can't think of them right now

REFERRALS AND CASES

5.3.4 Key principals

- “Do it now” concept
 - Timeliness and accuracy of the information maintained in the Portal is important
- Collaborative communications, especially for exceptions
- Clear direction to handle different scenarios, where required
- Talking to the Reg Reps, Team Assistants, and Claim Owners (guidelines)
 - Where to find the contact information in the Portal
 - Referrals Details screen under Claim Details – WorkSafeBC Contact Information
- Special considerations for access rights (i.e., visibility):
 - User can see only those Referrals or Cases associated to the locations they have access to
 - Within the context of the Provider Organization that they are currently logged in under
 - All users can see all areas of the Portal – Referrals, Cases, Invoicing, and Payments
 - No restrictions on any user’s ability to see specific areas of the Portal
 - No restrictions on any user’s ability to perform any task in the Portal (for example, anyone can create an invoice for a Referral that is associated to a location they have access to)
 - Only users requiring access to the Portal to perform specific functions, or access Referral or Case information should be provided access to the Portal

6 Major Business Processes: Referrals

6.1 Introduction

- Core main line first – happy path
 - Simple end to end processes
- Exceptions
- Special cases – typical problem and error situations
- User experience - potential challenged/problem areas
- Lifecycle for Referrals and Cases

6.2 Referrals – Core Main Line (Happy Path)

6.2.1 Acknowledge Referral

- Description:
To ensure that provider has awareness that a new Referral has arrived in the Portal
- Actions:
 - Select the Referral in the New Work List
 - Clicking on the Referral will auto-acknowledge the Referral and communicate this back to WorkSafeBC
- Practices and rules:
 - A new Referral must be acknowledged within 24 hours of its arrival in the Portal
 - A Referral that is not acknowledged within this 24 hour period will be removed from Portal

REFERRALS AND CASES

6.2.2 Accept Referral

- **Description:**
When a Referral is accepted, it is an indication that the provider is prepared to proceed with the Referral
 - The provider has the option to decline if they do not wish to proceed
- **Actions:**
 - Open the Referral to assess Referral and Claim details
 - Select Accept in the action panel, the Referral is updated to status of Accepted
- **Practices and rules:**
 - Once a Referral is accepted, it cannot be declined
 - When a Referral is accepted, a request for disclosure is automatically submitted to WorkSafeBC

6.2.3 Schedule Worker

- **Description:**
Scheduling the first appointment date for the Worker
- **Actions:**
 - Open the Referral
 - Using the Action Panel on the right-hand side, submit the first appointment date for the worker
 - Once submitted, the Referral will update to status of Scheduled
- **Practices and rules:**
 - A Referral must be scheduled within 3-5 day from the Acknowledged Date
 - The Acknowledged date is the date the Referral was Acknowledged by the current Provider
 - A Provider may reschedule or cancel an appointment date as often as necessary
 - A Referral that remains in the Accepted status beyond the scheduling window may be reallocated to another Provider or cancelled by WorkSafeBC.

REFERRALS AND CASES

6.3 Related Processes

6.3.1 Worker Requires Travel

- Description:
Notifying the Claim Owner that the Worker may require travel assistance
- Actions:
 - If the Worker's distance from the Provider is greater than 24km, no action is required
 - The Portal will automatically submit a notification to the Claim Owner when the first appointment date is first submitted
 - If the Worker's distance from the Provider is less than 25km, then the Provider may submit a notification to indicate travel assistance for the Worker may be required
 - A checkbox is available to the Provider to check, when this option is available
- Practices and rules:
 - Notification to check travel can only be submitted once, when the first appointment date is initially submitted
 - The Worker must coordinate with the Claim Owner directly for travel if there are any subsequent changes to the first appointment date
 - Note – The travel assistance required indicator is shown automatically once if a referral is accepted and the worker is travelling an extended distance

6.4 Request for Referral

- Description:
A Provider may request a Referral for a contracted program/service they provide, provided the Worker has an eligible Claim
- Actions:
 - Choose Request for Referral from the Referral's tab on the Top Navigation
 - Search for an eligible Claim using Claim Lookup
 - A matching Claim, if available, will be returned
 - Click the 'Request Referral' link on the eligible claim in the search results list
 - Complete and submit the Request for Referral

REFERRALS AND CASES

- Practices and rules:
 - A Request for Referral cannot be submitted if the Claim is not eligible
 - Eligible claim status includes:
 - Allowed
 - Pending
 - Only Provider Work Locations that the user has access to can be selected
 - Only Programs/Services contracted for the selected Work Location can be selected
 - Only Programs/Services enabled for the Request Referral function can be selected.

6.5 Managing Exceptions

6.5.1 Putting a Referral on Hold

- Description:

A Provider will put a Referral on Hold when they are unable to continue without assistance from WorkSafeBC
- Actions:
 - Locate Referral in Work List
 - Depending on the status of the Referral, it may be in either the Unscheduled or Scheduled Work Lists
 - Open the Referral and put it on Hold using the Action panel on the right side of the screen
 - When a Referral is put on Hold, the Provider must select the reason why it was put on Hold
 - The Referral will be updated to a status of Hold
- Practices and rules:
 - Before a Referral is accepted, it cannot be put on Hold
 - Once the Provider submits the Hold, the Referral is queue to the Exception Desk and will be reviewed by a Reg Rep
 - A Provider may remove the Hold if they are able to resolve the issue on their own
 - Only a Provider can put a Referral on Hold. A Reg Rep cannot put a Referral on Hold

REFERRALS AND CASES

6.5.2 Remove Referral from Hold

- Description:
When the reason for the Hold is resolved, the Referral is removed from Hold
 - Once the Hold is removed, the Provider is able to continue
- Actions:
 - Open the Referral and remove it from Hold using the Action panel on the right side of the screen
 - When the Hold is removed, the Referral will be updated to the status it was before it was put on Hold
- Practices and rules:
 - Either the Provider or a Reg Rep can remove a Referral from Hold

6.5.3 Cancel Entitlement

- Description:
A Claim Owner has determined that the Entitlement must be cancelled
 - Cancellation of Entitlement will terminate the Referral
- Actions:
 - In the Portal, the Cancelled Work List will display any Referrals that have been Cancelled
 - When the Entitlement is Cancelled, the Referral will be updated to a status of Cancelled
- Practices and rules:
 - Only a Claim Owner can cancel Entitlement
 - If the Entitlement was Cancelled before the Provider accepted the Referral, the Referral will no longer appear in the Portal

6.6 Request for Disclosure

6.6.1 Automatic Request for Disclosure

- The portal performs an auto disclosure request once the referral is accepted
- Date is shown in the History Panel
- Disclosure package request is allowed for all authorized programs in stage 1

6.6.2 Provider Generated Request for Disclosure

- Provider can request a disclosure manually at any time when a referral is between the Accepted and Interrupted state

7 Major Business Processes: Cases

7.1 Introduction

- Core main line first – happy path
 - Simple end to end processes
- Exceptions
- Special cases – typical problem and error situations
- User experience highlight potential challenged/problem areas
- Reference life cycle for Referrals and Cases

7.2 Referrals – Core Main Line (Happy Path)

7.2.1 Move Referral to Cases

(move the Referral from the Scheduled Referrals Work List to the Active Cases Work List)

- Description:
A Referral becomes an Active Case when the Worker shows up for the first scheduled appointment
- Actions:
 - Locate Referral in the Scheduled Referrals Work List
 - Open the Referral and move it to the Active Cases list using the Action panel on the right side of the screen
 - The Case will be updated to a status of Active
- Practices and rules:
 - A Referral cannot be moved to Active Cases list before the first appointment date
 - If the Worker did not attend the first appointment date, then Provider must:
 - Reschedule the appointment
 - Cancel the appointment, and reschedule it later
 - Put the Referral on Hold

REFERRALS AND CASES

7.2.2 Discharge Worker

- **Description:**
Once treatment has been completed according to the Program Plan, the Worker is discharged
- **Actions:**
 - Locate the Case in the Active Cases Work List
 - Open the Case and Discharge the Worker using the Action panel on the right side of the screen
 - The Case will be updated to a status of Discharged
- **Practices and rules:**
 - Once the worker is discharged, the Case cannot be moved back to the Active Cases List

7.2.3 Move Case to Done List

- **Description:**
A Case is moved to the Done List when it is effectively completed without any outstanding tasks
 - For example, all invoicing and reporting activities have been completed
 - The purpose of the Done List is to move completed Cases out of the Provider's Work Lists
- **Actions:**
 - Locate the Case in the Discharged Cases Work List
 - Open the Case and move it to the Done List using the Action panel on the right side of the screen
- **Practices and rules:**
 - Providers can still invoice and report from Cases in the Done List
 - Cases in the Done List can be moved back to the Discharged (or Closed) Work Lists

REFERRALS AND CASES

7.3 Managing Exceptions

7.3.1 Interrupt a Case

- Description:
 - There are three scenarios for a Case Interrupt:
 - As part of the Program Plan, there is an expected period of time the Worker cannot continue with treatment
 - Due to unforeseen circumstances, the Provider is unable to continue with the Program Plan
 - The Claim Owner has cancelled Entitlement
- When a Case is in the status of Interrupted, the Provider does not continue work until further notice
- In all 3 scenarios, the status of the referral will be displayed as Interrupted. The 2 section below details how to differentiate between the Interrupt scenarios.

7.3.1.1 Program Interrupt

Program interrupt happens when either the Worker or the Provider cannot continue with the program.

- Actions:
 - Contact WorkSafeBC
- Practices and rules:
 - Only the Reg Rep can put a Case into the status of Interrupted
 - When Referral has changed status to Interrupted, the notice column in the referral grid will display as “Program Interrupt”

Notice	1st Appt Date	Name	Claim #	Program/Service
<input type="text" value="Program Interrupt"/>	<input type="text" value="2012-03-26"/>	<input type="text"/>	<input type="text" value="05182023"/>	<input type="text" value="FCE"/>

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7.3.1.2 Cancellation of Entitlement

If the Entitlement is cancelled, the Case will transition to the status of Interrupted.

- Actions (by WorkSafeBC)
 - Reg Rep and/or Claim Owner will contact the Provider to inform them of the Cancelled Entitlement
- Practises and rules:
 - When the Referral has changed status to Interrupted, the notice column in the referral grid will display as “Interrupted”.
 - Provider will cease treatment and complete outstanding tasks (i.e., billing/reporting)
 - Once the Provider has been informed, the Reg Rep will update the Case to a status of Closed

Notice	1st Appt Date	Name	Claim #	Program/Service
Interrupted	2012-03-14		00318383	OR1

8 Summary of Key Points

1. As a suggestion, users should summarize the key points in the module (i.e., as a characterization of the business process and functionality that are pertinent to them or their organization's processes) including:
 - Key points and considerations
 - Practical guidelines
2. As a suggestion, users should consider "Applying what you learned" as follows:
 - **Ask** "what would you now do differently back on the job?"
 - Relate back to their experience discussed as part of the course
 - **Suggest** recording 3-5 key ideas, success factors or action steps
 - **Suggest** reviewing the Business Processes and write a short summary of the process and deliverables or key points for themselves
3. As a suggestion, users now have expanded their network of contacts (i.e., both within their own organization and externally with other providers) and they should be sure to use them.

9 Exporting Data

The Portal provides the ability to export data from the Portal to a .CSV file. Data export function is available on these views or pages:

- Referral “New” Grid
- Referral “Unscheduled” Grid
- Referral “Scheduled” Grid
- Referral “Cancelled” Grid
- Cases “Active” Grid
- Cases “Discharged” Grid
- Cases “Done” Grid

All records in the Grid, including filtered records, will be exported.

The following data elements for Referrals and Cases, if available, will be included for each record:

- Worker Information
 - Name
 - PHN
 - DOB
 - Age
 - Gender
 - Contact Info (all phone numbers listed) *
 - Address (all addresses listed) *
- Claim Information
 - Claim Number
 - Claim Date / Date of Injury
 - Claim Eligibility Status
 - Claim Owner Info
 - Name
 - Contact Number
 - TA Info (if available)
 - Name
 - Contact Number
 - Threat Code Indicator
 - Interpreter Required Indicator
 - Language
- Referral Information
 - Program / Service
 - Location
 - Referral Authorization Number
 - Referral Status
 - Date Referred
 - First Appointment Date (if available)

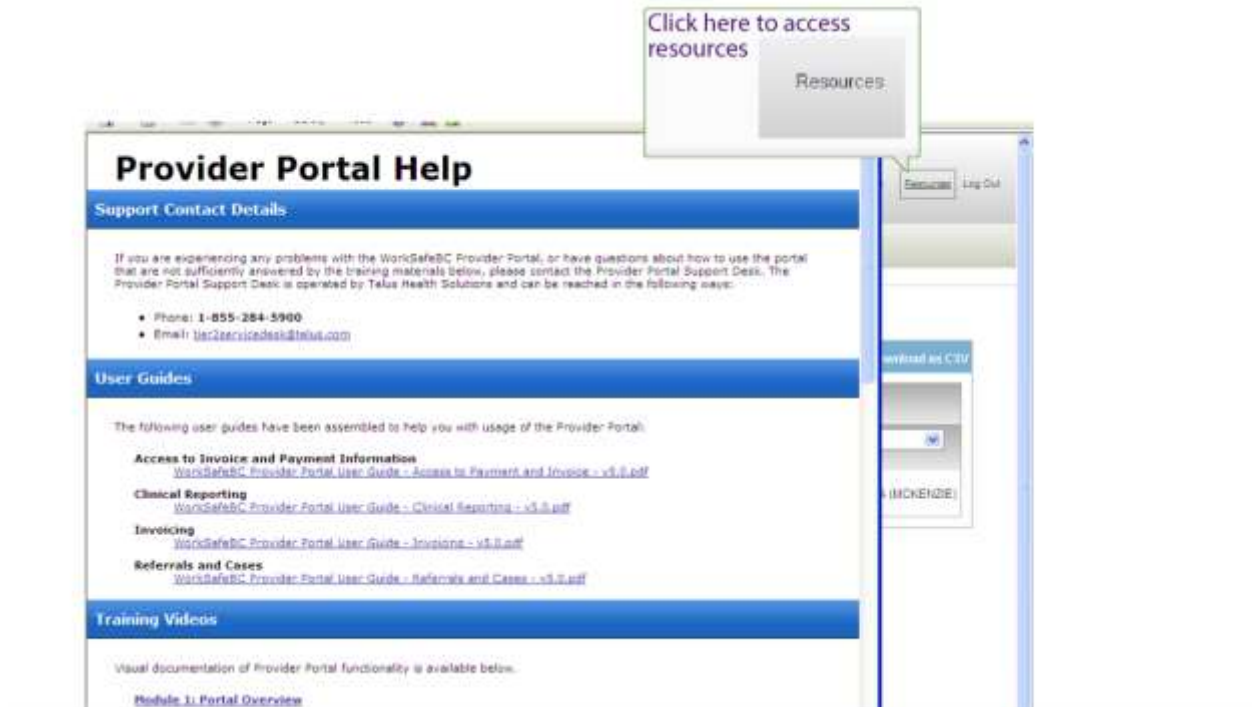
REFERRALS AND CASES

The “Download as CSV” function is located at the top right hand corner of each of the 7 grids.



10 Resources

The Resources section contains training materials and documents, including this user guide, for easy access by users.



Appendix A:

Supporting Details

10.1 Work Lists

10.1.1 New Referrals Work List

- Description:
Work list contains any Initiated/Acknowledged/Provider Requested referrals
- Actions:
 - Acknowledge a referral
 - Accept a referral
- Policy and rules:
 - 24 hour expiration period:
 - Measured within the context of current allocated provider
 - Provider loose referral if the referral is not acknowledge

10.1.2 Unscheduled Referrals Work List

- Description:
Primary work list for scheduling
 - Contains Accepted or Holds (unscheduled previously) referrals
- Actions:
 - Schedule a referral
 - Hold a referral
- Policy and rules:
 - 3-5 day scheduling window
 - Measured within the context of current allocated provider
 - Referral will be reallocated to another Provider or Cancelled if Referral remains in Accepted status for an extended period of time.
 - Provider can opt to receive email warning notifications of inactive Referrals prompting them into action

REFERRALS AND CASES

10.1.3 Scheduled Referrals Work List

- Description:
Work list contains any Scheduled or Holds (scheduled or scheduled pending approval previously) referrals
- Actions:
 - Re-schedule a referral
 - Cancel an appointment
 - Put referral on Hold
 - Move the referral to Active (move referral to cases) the rules include:
 - The worker started the program – happy path
 - Worker shows up on 1st appointment date
 - Can only activate the referral on or after 1st appointment date
 - If the worker did not attend – explain the problem
 - Re-schedule the referral
 - Cancel appointment
 - Hold
 - Note – procedure for handling the following – if the worker shows up late (after 1st appointment date), but provider did NOT re-schedule it and activate the referral this scenario makes the 1st appointment date incorrect

10.1.4 Cancelled Referrals Work List

The Cancelled Referrals Work List contains all Cancelled and Rejected Referrals

10.1.5 Active Cases Work List

The Active Cases Work List contains all Cases that are:

- Active – Worker has shown up for the first appointment date:
 - Has been, or is being, assessed and/or is in treatment
- Closed – Worker was not able to complete the treatment plan
 - Claim Owner Cancelled Entitlement
 - Reg Rep Closed the Case

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- Interrupted – Worker is unable to continue with treatment plan at the moment, due to:
 - An unforeseen problem
 - A planned interruption that is part of the treatment plan

10.1.6 Discharged Cases Work List

The Discharged Cases Work List contains all Cases where the Worker has completed the assessment and/or treatment according to plan and has been discharged.

10.1.7 Done Work List

The Done Work List is essentially an archive of Cases where all associated activity with the Case has been completed.

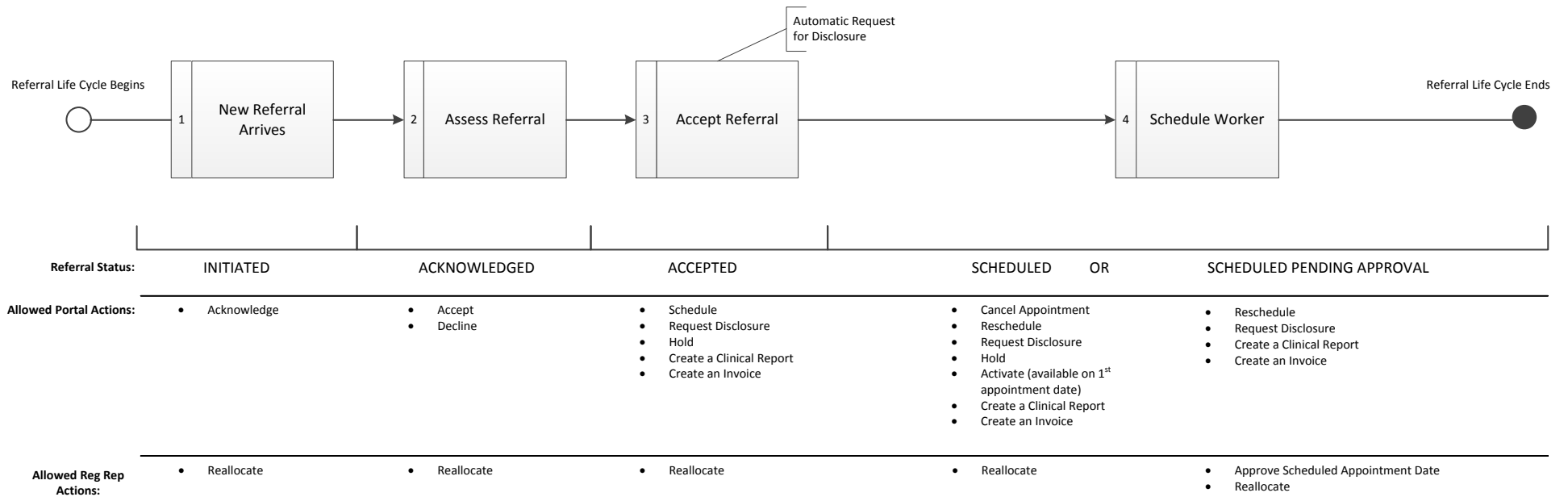
- For example, the Worker has been discharged and all invoicing and reporting for the Case has been completed.

Appendix B: Referral & Cases Life Cycles

REFERRALS AND CASES

Referral Life Cycle Diagram

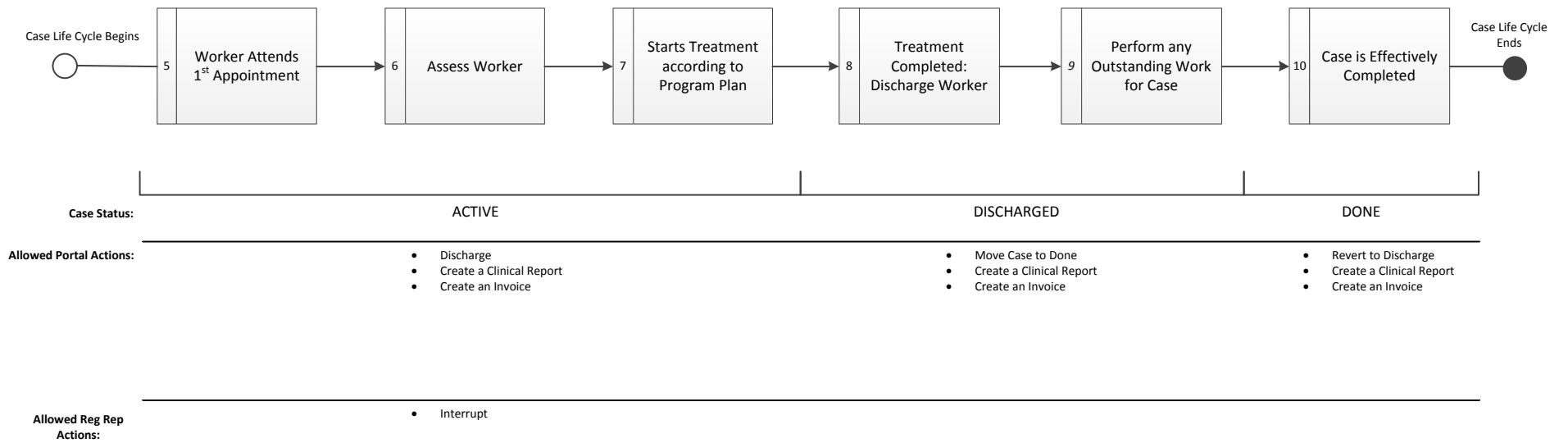
Referral Life Cycle (Core Main Line)



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Case Life Cycle Diagram

Case Life Cycle (Core Main Line)



REFERRALS AND CASES

Appendix C: Summary of Revisions

Revision	Changes to document
V5.1	<ul style="list-style-type: none"> ▪ Addition of 3.5.2.1 Worker Temporary Address and Phone Number. ▪ Addition of 3.5.7 Report Submission History and 3.5.8 Invoice Submission History. ▪ Changes to 7.3 Managing Exceptions Interrupt scenarios and visual indicators in the Portal to differentiate the scenarios. ▪ Addition of Section 9 Exporting Data ▪ Addition of Section 10 Resources
V5.2	<ul style="list-style-type: none"> ▪ Updated screenshots, Sections 4 and 5 Window of Tolerance calculation from Referral Acknowledge Date.
V5.3	<ul style="list-style-type: none"> ▪ Modifications and updates throughout to correct business processes in reference to Accepted Referrals (Accepted Status Expiration) ▪ Updates to screenshots, where require to reflect relevant UI changes ▪ Addition of 3.7 Global Search ▪ Addition of 3.8 Email Notifications ▪ Modifications throughout to incorporate email notifications in business process references ▪ Modifications throughout to improve content flow ▪ Update to Section 2 ▪ Update to Section 3.3. ▪ Modification to Section 3.6 Provider Requested Referral and related changes throughout document where appropriate