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| **Bullseye with solid fillPurpose**  To guide users in completing the case management referral in Jiva | **Effective Date:** | 10/7/24 |
| **Approved by:** | Tapinder Dhillon |
| **Department:** | Case Management |
| **Tools with solid fillYou’ll need:**  Access to Jiva provider portal | **Revision Number:** | Ver. 1 |
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| **Revision Date** | **Change Description** | **Author** |
| [Enter a date] |  |  |
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1. Locate member to be referred: Click “Menu” and then select “New Request”

A screenshot of a phone

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1. Add Member ID and select “Search”



1. A screenshot of a computer

   Description automatically generatedClick “Add Request” drop down (right side of the screen) and select “Case Management”
2. If the following message appears when you click “Case Management” – Select “Ok”

Graphical user interface, text, application

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1. Complete Episode Details:

**Episode Status:** Referral

**Source:** Select appropriate source. For example: Provider, Physician on behalf of Member, Contract Physician/Provider

**Reason for Request:** Case management/Coordination of care or Pregnancy education

**Please do not edit the acuity from “0”**

A screenshot of a computer

Description automatically generated**Leave Member class, Episode class, Severity and complexity type fields BLANK**

1. Please **“Do not add”** Program Name and Program Open reason

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1. Add diagnosis if available

A white box with black text

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1. Complete “Notes” section:

**Note Type:** Provider Portal

**Notes:** Add “Detailed Reason for Referral” Under “Notes” tab

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1. Click Save and Continue



1. The Episode/Referal is now created

Graphical user interface, text, application

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