|  |
| --- |
|  |
|  |
| **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 |
|  |

|  |  |  |
| --- | --- | --- |
| **Revision Date** | **Change Description** | **Author** |
| [Enter a date] |  |  |
|  |  |  |

|  |
| --- |
|  |

1. Locate member to be referred: Click “Menu” and then select “New Request”



1. Add Member ID and select “Search”



1. Click “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”



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”**

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

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



1. Add diagnosis if available



1. Complete “Notes” section:

**Note Type:** Provider Portal

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



1. Click Save and Continue



1. The Episode/Referal is now created

