

## **Registry of Unmet Needs**

The purpose of the registry of unmet needs is to allow the LME and Providers to coordinate services for consumers. The LME will be responsible for entering consumers who need a service and the providers will be responsible for posting available services, reviewing clients for appropriateness and then placing the consumer. This module, will allow better tracking to ensure consumers are placed in the services available.

The LME will be responsible for ensuring the consumers who need services are listed in the system. Each consumer will be listed on the wait list for all services they may be waiting to receive, so one consumer may be listed for several different services you have available.

Providers will be responsible for adding service openings, including the vacancy date, gender preference, status, service, site location, age group, service type and ambulatory type. This will allow the providers to search for consumers who are appropriate for the vacancy based on the criteria entered.

The next few screens, will show you how to add a vacancy, search for appropriate consumers to fill the vacancy, review those clients, then conclude with a denial of reviewed clients that will not be appropriate for the vacancy and placement and authorization of the consumer who can fill the vacancy.

## Enter a New Vacancy

From the Client Gateway, Click on the Registry for Unmet Needs link.

The screenshot shows the 'Registry Vacancy Search' page. At the top left is a 'Back to Gateway' button. The page title is 'Registry Vacancy Search'. Below the title, it says 'Test Z'. A search instruction reads: 'Search for Provider's posted openings on Registry of Unmet Needs'. The search criteria include: 'Srvc' (dropdown), 'Type' (dropdown), 'Vac Date' (two input fields for month and year), and 'Status' (dropdown). A 'Clear Selections' link is on the left. On the right, there are icons for search, refresh, and a circled orange and blue add button.

Click the Orange and Blue Add Button, the next screen allows you to enter details about the vacancy.

The screenshot shows the 'Registry of Unmet Needs Add/Edit' page. At the top left is a 'Back to Gateway' button. The page title is 'Registry of Unmet Needs Add/Edit'. Below the title is a 'BACK' button with a left arrow. The form contains the following fields: 'Provider ID' (20297), 'Provider Name' (Test Z Provider, Inc), 'Vacancy ID #' (119), 'Service' (dropdown), 'Srvc Type' (dropdown), 'Vacancy Date' (11/18/2009), 'Site' (dropdown), 'Age Group Preference' (dropdown), 'Ambulatory' (dropdown), 'Gender Preference' (dropdown), 'Status' (Vacant), 'Diag' (dropdown), 'Licensed Bed Cnt' (input), 'Contact' (input), and 'Phone' (input). A 'Notes' text area is at the bottom. A 'Save' button is at the bottom center.

- Vacancy Date – will default to TODAY, however can be changed to a future date if necessary
- Gender Preference – Male, Female or Unspecified
- Status – will default to Vacant, can be changed to Under Review or Placed when appropriate
- Contact – Contact name for information about the vacancy, typically used for the LME to contact the provider if needed

- Provider Name – will default to the provider which you logged into the system as. This cannot be changed.
- Service – select the service from the dropdown box, only services which are approved for the waitlist are in the dropdown box
- Site – if the provider has multiple sites, select the site where the vacancy is located
- Age Group Preference – All, Child, Adult, 18-20, or 21-50
- Service Type – MH, SA or DD
- Phone – Contact number for information about the vacancy, typically used for the LME to contact the provider if needed
- Diagnosis – this is used for the very specific vacancy needs, select one of the choices in the dropdown box if applicable or leave blank.
- Ambulatory – Ambulatory Only, Non-Ambulatory, or Either (which type of consumer can go in this room, this will ensure a Non-Ambulatory consumer isn't placed in a service that will not accommodate their handicap)
- Licensed Bed Count – Enter the number of licensed beds
- Notes – type any notes relevant to the vacancy

Once all fields are filled, click the save button to continue. Please note you will only be able to add a vacancy for services which are in your contract.

When a vacancy has been successfully saved, you will see a red note at the top of the screen.

The screenshot shows a web form titled "Registry of Unmet Needs Add/Edit". At the top left is a "Back to Gateway" button. Below it is a "BACK" button with a left-pointing arrow. A red message states: "Vacancy Entry has been successfully saved to the Registry of Unmet Needs!". The form contains the following fields:

- Provider ID: 20297
- Provider Name: Test Z Provider, Inc
- Vacancy ID #: 119
- Service: Residential Supports (dropdown)
- Service Type: DD (dropdown)
- Vacancy Date: 11/18/2009
- Site: (empty dropdown)
- Gender Preference: (empty dropdown)
- Age Group Preference: (empty dropdown)
- Ambulatory: Ambulatory Only (dropdown)
- Status: Vacant (dropdown)
- Diag: Autism (dropdown)
- Licensed Bed Cnt: 6
- Contact: Rita Test
- Phone: 555-555-1234
- Notes: test

At the bottom of the form are three buttons: "Save", "Select Clients", and "Cancel".

Click the back button to return to the main Registry Screen.

## View Vacancies

From the main Registry Screen, you can search for vacancies by using the filters, or you can search for all by clicking the binoculars. If you have a lot of vacancies, it would be best to filter based on Service, Type, Date or Status.

**Back to Gateway**
**Registry Vacancy Search**

Test Z

Search for Provider's posted openings on Registry of Unmet Needs

Srvc  Type  Vac Date - Status

[Clear Selections](#)

Service	Type	Site	Status	Vacancy Date	Placed Date	Closed (No Placement)
H2022 Intensive In-Home Services	DD	Test Z	Under Review	02/02/2009		
H2016 HI Residential Supports Level 4	DD	Test Z	Vacant	02/02/2009		
H2012 - HA - Day Treatment Child	DD	Test Z	Vacant	02/02/2009		
H2022 Intensive In-Home Services	MH		Under Review	02/20/2009		
YM814 Supervised Living - 4 Residents	DD	Test Z Site 2	Vacant	02/27/2009		

All Vacancies for Test Z Provider

**Back to Gateway**
**Registry Vacancy Search**

Test Z

Search for Provider's posted openings on Registry of Unmet Needs

Srvc  Type  Vac Date - Status

[Clear Selections](#)

Service	Type	Site	Status	Vacancy Date	Placed Date	Closed (No Placement)
H2022 Intensive In-Home Services	DD	Test Z	Under Review	02/02/2009		
H2022 Intensive In-Home Services	MH		Under Review	02/20/2009		

Only showing vacancies sorted by Status of Under Review, you could use additional filters to minimize your results.

## Find Consumers for a Vacancy

Consumers will be loaded into the system and monitored by LME staff. Each consumer will be entered with criteria that will be used to match the consumer up to an appropriate vacancy.

From the view vacancies screen, select the vacancy you wish to work with by clicking on the icon to the left of the vacancy. You will use the same screens to select clients as you would use to review the vacancy and edit it.

Service	Type	Site	Status	Vacancy Date	Placed Date	Close
H2016 HI Residential Supports Level 4	DD	Test Z	Vacant	02/02/2009		
H2012 - HA - Day Treatment Child	DD	Test Z	Vacant	02/02/2009		
YM814 Supervised Living - 4 Residents	DD	Test Z Site 2	Vacant	02/27/2009		

Next, review the vacancy for accuracy, then click the **Select Clients** button to find clients who have matching criteria to be placed in this vacancy. LME Staff have entered the consumers in the system with the appropriate fields completed, if you have a vacancy, all fields will be checked to only pull clients who need that service you have open and who fit the criteria as far as gender, age group, service population group, and ambulatory status. The results will show up to 10 consumers at a time, any consumer entered into the database with an Emergent status will be at the top of the list since they have the highest priority, all other clients will be prioritized by length of time on the wait list for the service available.

NOTE: If you identified the vacancy as Autism or Prader Willi from the diagnosis dropdown box, only clients with those diagnoses will be returned in your results. The Autism choice will pull clients with 299.0, 299.00 and 299.01 on their record and, Prader Willi will only pull clients with 759.81 on their record.

**Save** **Select Clients**

Client	Gender	Age	SIS	Emergent	Status	Eff Date	TAR Submitted	Placed Date
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By clicking **Select Clients** you will be taken to the list of consumers who fit the criteria for the vacancy opening. Notice on the screen shot below, the first consumer on the list is marked as Emergent; however her Effective Date from being placed on the waiting list registry was more recent than the rest of the dates.

[Back to Gateway](#)

Provider: Test Z  
Service: H2016 HI Residential Supports Level 4

Client ID	Client Name	Gender	Age	SIS	Calocus/Locus	Emergent	Effective Date	Status	Review	Reject Reason	Note
		F	29			<input checked="" type="checkbox"/>	02/27/2009	Available	<input type="checkbox"/>		
		F	63			<input type="checkbox"/>	09/05/2006	Available	<input type="checkbox"/>		
		F	61			<input type="checkbox"/>	04/16/2007	Available	<input type="checkbox"/>		
		F	85			<input type="checkbox"/>	06/27/2008	Available	<input type="checkbox"/>		
		F	43			<input type="checkbox"/>	02/27/2009	Available	<input type="checkbox"/>		

[Save/Continue](#) [Cancel/Revise](#) [Finish List](#)

You will only be able to see up to 10 consumers at a time, you must work with the first 10 consumers before you can see additional consumers.

To select a consumer for review, click the Review checkbox in the row their name is contained in. You must mark the consumer for Review **or** give a Review Reject Reason on all consumers on the list before you can Save/Continue to see additional consumers. If you click Save/Continue before you have marked something on all consumers on the list, you will get an error message as seen below. Depending on the Reject Reason you have selected, the Notes Field may be required. (If you select "Other" it will be required, but if you select "Individual wants to be placed in \_\_\_\_\_ County" the field is not required).

[Back to Gateway](#) Client ID: [redacted], [redacted] - Please mark client(s) for review OR indicate reason for review rejection.

Provider: Test Z  
Service: H2016 HI Residential Supports Level 4

Client ID	Client Name	Gender	Age	SIS	Calocus/Locus	Emergent	Effective Date	Status	Review	Reject Reason	Note
		F	29			<input checked="" type="checkbox"/>	02/27/2009	Available	<input checked="" type="checkbox"/>		
		F	63			<input type="checkbox"/>	09/05/2006	Available	<input type="checkbox"/>	Unable to Contact	
		F	61			<input type="checkbox"/>	04/16/2007	Available	<input checked="" type="checkbox"/>		
		F	85			<input type="checkbox"/>	06/27/2008	Available	<input type="checkbox"/>		
		F	43			<input type="checkbox"/>	02/27/2009	Available	<input type="checkbox"/>		

[Save/Continue](#) [Cancel/Revise](#) [Finish List](#)

**NOTE:** If you click the **Save/Continue** button and there are no additional consumers to review, the screen will be empty, but still have the option to click the Finish List button.

Once you have appropriately marked all consumers and have selected the consumers you wish to review, click the Finish List button. Next, we will work with consumers which you have marked for review.

## Working with Consumer's Marked for Review

The purpose of marking a consumer for review is so the provider will be able to note which consumers could potentially be placed in the vacancy. The provider will be responsible for reviewing the consumer and then either rejecting the consumer or placing the consumer. To see the clients listed as "Under Review", from the main waitlist page, use the search filters to search for vacancies, or click the binoculars to search for all.

**Back to Gateway**
**Registry Vacancy Search**

Test Z

Search for Provider's posted openings on Registry of Unmet Needs

Srvc  Type  Vac Date - Status

[Clear Selections](#)

The list of vacancies will be listed at the bottom of the screen, click the icon to the left of the vacancy you wish to review.

**Back to Gateway**
**Registry Vacancy Search**

Test Z

Search for Provider's posted openings on Registry of Unmet Needs

Srvc  Type  Vac Date - Status

[Clear Selections](#)

Service	Type	Site	Status	Vacancy Date	Placed Date	Closed (No Placement)
H2022 Intensive In-Home Services	DD	Test Z	Under Review	02/02/2009		
H2016 HI Residential Supports Level 4	DD	Test Z	Under Review	02/02/2009		
H2012 - HA - Day Treatment Child	DD	Test Z	Vacant	02/02/2009		
H2022 Intensive In-Home Services	MH		Under Review	02/20/2009		
YM814 Supervised Living - 4 Residents	DD	Test Z Site 2	Vacant	02/27/2009		

After selecting the vacancy, at the bottom of the screen, you will see a list of consumers you have marked for review. To work with the consumers who have been marked Under Review, click the icon to the left of their name.

**Back to Gateway** Registry of Unmet Needs Add/Edit

**BACK**

Vacancy Entry has been successfully saved to the Registry of Unmet Needs!

Provider ID: 20297    Provider Name: Test Z Provider, Inc

Vacancy ID #: 119    Service: Residential Supports    Svc Type: DD

Vacancy Date: 11/18/2009    Site:    Ambulatory: Ambulatory Only

Gender Preference:    Age Group Preference:    Status: Vacant    Diag: Autism    Licensed Bed Cnt: 6

Contact: Rita Test    Phone: 555-555-1234

Notes: test

Clients Marked For Review for this Vacancy   
 Include Clients who have already been reviewed

Client	Gender	Age	SIS	Emergent	Status	Eff Date	TAR Submitted	Placed Date
<input type="checkbox"/> Test16 Test16	M	109	98	<input type="checkbox"/>	Under Review	10/16/2009	NO	
<input type="checkbox"/> Test15 Test15	F	109	79	<input type="checkbox"/>	Under Review	10/16/2009	NO	
<input type="checkbox"/> Test14 Test14	F	108	78	<input type="checkbox"/>	Under Review	10/16/2009	NO	
<input type="checkbox"/> Test100 Test100	F	108	100	<input type="checkbox"/>	Under Review	10/16/2009	NO	
<input type="checkbox"/> Test4 Test4	F	109	58	<input type="checkbox"/>	Under Review	11/04/2009	NO	
<input type="checkbox"/> Test3 Test3	M	109	68	<input type="checkbox"/>	Under Review	11/04/2009	NO	
<input type="checkbox"/> Test20 Test20	F	108	46	<input type="checkbox"/>	Under Review	11/04/2009	NO	
<input type="checkbox"/> Test2 R Test2	M	109	48	<input type="checkbox"/>	Under Review	11/04/2009	NO	

You must select and give a reject reason for all consumers before you will be allowed to mark a consumer for placement. Select the reason from the dropdown box, enter a note about the rejection reason then click Save. The consumer will be removed from the list. Continue working until all consumers are removed from the list, placing the last consumer if appropriate. You will be allowed to search for any new consumers on the waitlist if none of those selected initially were able to be placed.

Client	Gender	Age	SIS	Emergent	Status	Eff Date	Placed Date
<input type="checkbox"/>	F	29		<input checked="" type="checkbox"/>	Under Review	02/27/2009	
<input type="checkbox"/>	F	61		<input type="checkbox"/>	Under Review	04/16/2007	
<input type="checkbox"/>	F	85		<input type="checkbox"/>	Under Review	06/27/2008	

Client Name:

Select Client for Placement   
 Reject Reason: Individual Deselected   
 Note: Selected emergent cons.

If you select a consumer and mark them for placement, you will see a red error message stating that you must review all clients before you can place the one (as shown below).

Client	Gender	Age	SIS	Emergent	Status	Eff Date	Placed Date
[icon] [blurred]	F	29		<input checked="" type="checkbox"/>	Under Review	02/27/2009	
[icon] [blurred]	F	61		<input type="checkbox"/>	Under Review	04/16/2007	
[icon] [blurred]	F	85		<input type="checkbox"/>	Under Review	06/27/2008	

Please mark all other clients chosen for review with reason for rejection before placing this client.

Client Name: [blurred]

Select Client for Placement    Reject Reason:     Note:

**Save**

Once all consumers you marked for review have been worked with, if none were appropriate to be placed in the vacancy, return to the **Find Consumers for a Vacancy** to search for additional consumers.

Please note once you have searched for consumers and selected some for review, by default those consumers will not come up on your search again. In order to see those consumers again and be able to evaluate them again, please make sure you click the “Include Clients who have already been reviewed” checkbox. Any consumer you have already reviewed will then be populated on the bottom of the screen.

Clients Marked For Review for this Vacancy     Include Clients who have already been reviewed

[icon]

Client	Gender	Age	SIS	Emergent	Status	Eff Date	Placed Date
[blurred]	F	29		<input checked="" type="checkbox"/>	Available	02/27/2009	
[blurred]	F	61		<input type="checkbox"/>	Available	04/16/2007	
[blurred]	F	85		<input type="checkbox"/>	Available	06/27/2008	

Clients Marked For Review for this Vacancy     Include Clients who have already been reviewed

[icon]

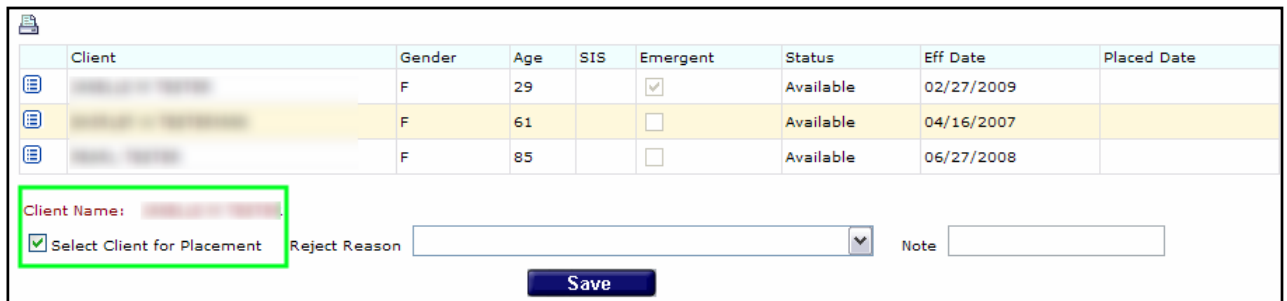
Client	Gender	Age	SIS	Emergent	Status	Eff Date	Placed Date
[blurred]	F	29		<input checked="" type="checkbox"/>	Available	02/27/2009	
[blurred]	F	61		<input type="checkbox"/>	Available	04/16/2007	
[blurred]	F	85		<input type="checkbox"/>	Available	06/27/2008	

## Working with Consumers Marked for Placement

From the previous section, you learned how to mark consumers for review. All consumers must be given a rejection reason before a consumer can be marked for placement.

To mark a consumer for placement, click the “Select Client for Placement” checkbox. Remember all other consumers must have a reject reason before a placement can be saved.

Click the Save Button to proceed with an Authorization for Placement.



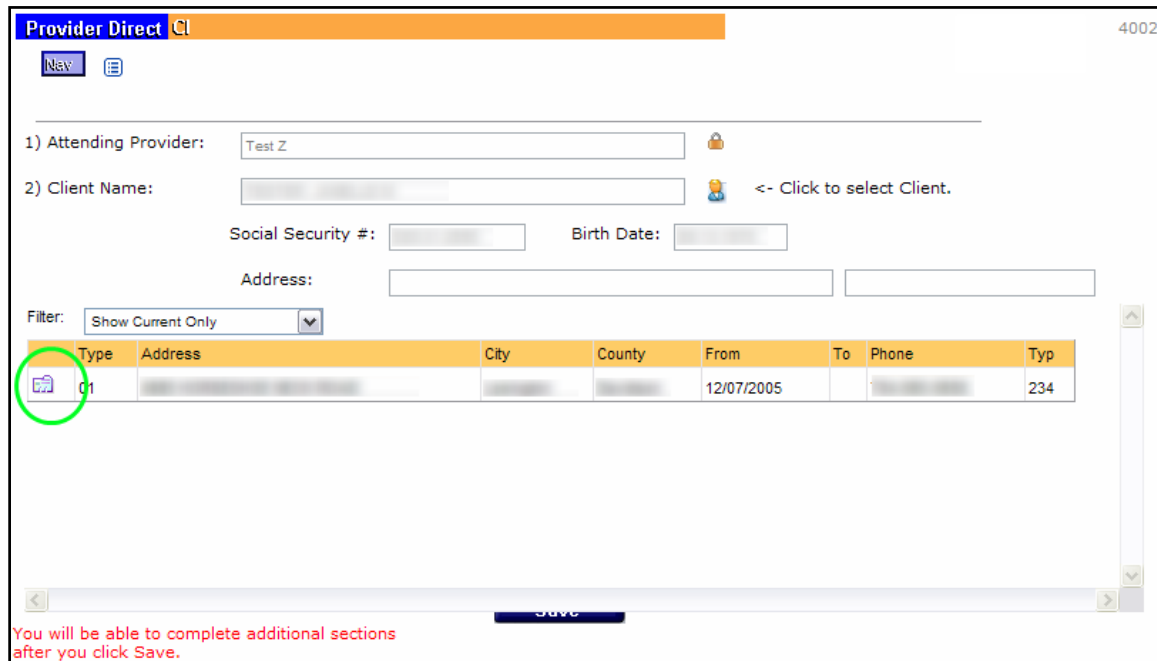
Client	Gender	Age	SIS	Emergent	Status	Eff Date	Placed Date
[REDACTED]	F	29		<input checked="" type="checkbox"/>	Available	02/27/2009	
[REDACTED]	F	61		<input type="checkbox"/>	Available	04/16/2007	
[REDACTED]	F	85		<input type="checkbox"/>	Available	06/27/2008	

Client Name: [REDACTED]

Select Client for Placement    Reject Reason: [REDACTED]    Note: [REDACTED]

**Save**

By clicking save above, you will be taken to the 1<sup>st</sup> page of the Treatment Authorization Request (TAR). Click the icon to the left of the address on the screen (shown below), then proceed with completing the TAR.



Provider Direct 4002


1) Attending Provider: Test Z

2) Client Name: [REDACTED] <- Click to select Client.

Social Security #: [REDACTED]    Birth Date: [REDACTED]

Address: [REDACTED]

Filter: Show Current Only

Type	Address	City	County	From	To	Phone	Typ
 01	[REDACTED]	[REDACTED]	[REDACTED]	12/07/2005		[REDACTED]	234

**Save**

You will be able to complete additional sections after you click Save.

After selecting the consumers address, complete the rest of page 1 by filling in the Initial Assessment Date, Client Specialty, Treatment Type and Request Type. Click Save to get the navigation icons on the top of the TAR.

The screenshot shows a web application interface titled "Provider Direct" with a user ID of "4002". The form contains the following fields and options:

- 1) Attending Provider: Text input field containing "Test Z".
- 2) Client Name: Text input field with a dropdown arrow and a note "<- Click to select Client.".
- Social Security #: Text input field.
- Birth Date: Text input field.
- Address: Text input field.
- City: Text input field.
- State: Text input field.
- Zip: Text input field.
- 3) Initial Assessment: Text input field containing "3/5/2009".
- 4) Client Specialty: Radio buttons for MH (selected), SA, and DD.
- 5) Treatment: Radio buttons for Voluntary (selected) and Involuntary.
- 6) Request Type: Radio buttons for Initial Request (selected), Reauthorization, and Discharge.
- 7. Expedited: Checkmark box.

A "Save" button is located at the bottom center of the form. Below the form, a red message states: "You will be able to complete additional sections after you click Save."

**\* Remember if a consumer you are placing has a PBH Support Coordinator that Support Coordinator will also need to complete an ISP update to accompany the TAR you have just submitted. All PBH Support Coordinators can be reached by calling the main People Driven Supports phone number, 704-721-2700.**

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