

# TANF Contracted Physician Referral Desk Aid

For reference on the TANF Disability Process, see [WorkFirst Handbook Section 6.8 Exemptions and 6.8.7 SSI Referrals](#).

**NOTE:** This desk aid uses a fictitious name (Sara Seahawk) and identifiers.

## Assigning Users

The barcode administrator for your CSO must assign access rights to everyone who will be making TANF contracted physician referrals. From the menu bar select [Maintenance] -> [Users] -> [J TANF Disability Assessment]

## Making Referrals

1. Sign in to Barcode and select the Subsystems tab in the pull-down menu select [TANF Disability Assessment].
2. The *TANF Disability Assessment Search Screen* is the first screen you will come to.

Barcode

File Reports

TANF Disability Assessment Search Screen

Clear Search

Case# 5 Client# 2564520 AU# SU#

Last First MI Sex

DOB / / Age +/- 10 yrs SSN - - Case Detail: SHOW ALL

TANF Referral AU:CI 5 matches. Done

Case/AU	Pr	Ofc	Sts	Rel	Client #	Name	Birth	SSN
4545508	FS	67	A:A	SE	2564520	SEAHAWK, SARA	06/14/90	***-**-2248
4656725	AF	67	A:A	SE	2564520	SEAHAWK, SARA	06/14/90	***-**-2248
4438389	AF	67	C:C	SE	2564520	SEAHAWK, SARA	06/14/90	***-**-2248
4628799	FS	34	D:D	SE	2564520	SEAHAWK, SARA	06/14/90	***-**-2248
4446002	MA	67	C:C	SE	2564520	SEAHAWK, SARA	06/14/90	***-**-2248

- a. You can search by various parameters. Once a client has been found, the [TANF Referral] button will be available.
- b. Click [TANF Referral].

3. You will be brought to the TANF Disability Assessment Screen. This is the main screen.

- a. Select the [Referral Type] and enter the [Disability Onset Date].
  - b. Leave [Does the client appear to meet SSI disability criteria] blank.
  - c. Go to the [Letters/Forms] menu option and select [14-507]. This will save your work and take you to the Print 14-507 Screen.
4. The Print 14-507 Screen is where the user fills out the 14-507 to send to the doctor. It does not select the doctor until the [Send] or [Preview] button is pressed.
- a. Fill out the all fields. Note: you can use canned text functionality.
  - b. Check off the forms and medical reports you will be sending.
  - c. Attach images from DMS by selecting the [Attach Image] button.
  - d. You can only send 50 pages total. If you have lengthy medical reports, right click the [Attach Image] button to access an option to select pages.

Print 14-507 (Disability Assessment: TANF Referral)

Client Name: **SEAHAWK, SARA** Client Number: **2564520** Age: **29**

Doctor's Name: **Dr. J. Dalton or Dr. David Deutsch or Trula J. Thompson, MD or Dr. Dana Harmon**

Comments: Clear Text  
 No gainful employment for 15 years.

Diagnoses: Clear Text  
 Generalized Anxiety Dx, Moderate to Severe; Major Depressive Dx, recurring; No Substance Abuse Reported

Education:  Primary Occupation:

Check the info you are attaching **This does not automatically attach this form, you must still manually attach the image.**

☐ 14-050 (Statement Health, Educ & Employ) ☐ 14-332 (Disability Assessment)

☐ HCS CARE Assessment ☒ Personal Observations

☒ Medical Reports (indicate medical report dates):

Enter the name of the person this form is from:

ACES ID:

Worker's Phone Number

Attachments  
☒ Attach Image

SEND Preview  
Cancel

e. Click [Send] to complete the referral

5. Users get to the Select specific pages to print screen when they right click the [Attach Image] button on the Print 14-507 Screen. This screen allows the users the ability to select only certain pages out of document to send to the doctor.

- f. Click [View Image] to determine which pages you want to send.
- g. Enter pages in the [Pages to Print] field.
- h. Click [Done] to return to the Print 14-507 Screen then click {Send} to complete the referral.
- i. See the Addendum to TANF Referral section below if you still exceed the 50-page limit.

[illegible]

## Addendum to TANF Referral

If the user selects to print the 14-507 from the [Letters/Form] menu and a request is already pending they will get the Print 14-507a Screen instead. This screen is to send more information to the doctor if the doctor requests more information or if the image you need to send is more than 50 pages long.

☐ **Select specific pages to print.**

You have selected these ECR documents to attach to this letter. Please select the pages of these documents you want to attach. (ex: 2-4, 6, 8, 13-15)

Done

Document	Pgs	Pages to Print
Psychological/Psychiatric Evaluation	6	1 - 6

Total number of pages selected to print: 6

View Image

☐ **Print 14-507a (Addendum to TANF Referral)**

Client Name: SEAHAWK, SARA

Client Number: 2564520

Age: 29

Doctor's Name: Thackery Binx, MD

Addendum to the referral sent on: 11/05/2019

Comments:

Clear Text

No gainful employment for 15 years.

Enter the name of the person this form is from:

ACES ID: MCSR Sarah Mintzer

360-725-4619

Worker's Phone  
Number

Attachments



Attach Image

SEND

Preview

Cancel



## Processing Contracted Physician Decisions

Once the Contracted Physician makes a decision, the case manager who submitted the TANF Disability Assessment (TDA) will be notified via a DMS assignment.

1. Use the *TANF Disability Search Screen* in barcode to access the *TANF Disability Assessment Screen*.
2. Enter either the approval or denial (which opens the rest of the screen) and select [Physical] or [Psychological].
3. Enter the [Approve/Deny Date] and if denied, select the reason for denial from the pull-down menu.
4. Select [Save] to record the decision.
5. The Contracted Physician and the date the referral was sent and approved will be date stamped on the screen below.
6. If you need to resubmit the case for any reason in the future, you can click on the [New] button to re-refer the case. For example, the case may be denied for insufficient medical evidence. If you obtain additional evidence, you can re-refer the case with additional evidence by clicking on the [New] button.

TANF Disability Assessment

Client Name: SEAHAWK, SARA

Client Number: 2564520

Save

Worker's ACES ID: MCSR Sarah Mintzer

Age: 29

Cancel

Select referral type

☐ Physical referral

☒ Psychological referral

Make sure you select the referral type correctly.  
A doctor will automatically be selected based on the referral type(s) selected.

Record 1 of 1

Prev

Next

New

Disability Onset Date: 01/01/2010

Does client appear to meet SSI disability criteria? ☒ Yes ☐ No

Evidence decision was based on: ☐ Physical ☒ Psychological

Decision Date: 11/05/2019

Reason for not meeting SSI disability criteria:

Close Date: 11/05/2019