AGENCY REFERRAL PROCESS FOR VETERANS INC.

INDEPENDENCE HALL & VETERANS PROGRAMS

Overview

The referral process has two required parts:

1. Submission in AdvancedMD
2. Completion of the Agency Referral Microsoft Form

Both parts must be completed for the Admissions team to begin the review.

Video Guide: https://youtu.be/RtXKx1Ou5rs

Part 1 – Submit the Referral in AdvancedMD

Step 1 – Go to the IH Website

1. Open your browser and go to: **recoverindependence.org**
2. Click on **Admissions**.
3. Select **Agency Referral Form**.

A new window will open with the **AdvancedMD** referral form. (direct link: **https://pp-wfe-102.advancedmd.com/151766/onlineintake/demographic)**

Step 2 – Select "I am NOT the patient"

1. At the top of the **Patient Details** section, select: **"I am NOT the patient."**
2. This will open additional fields for **your contact information**.

This step is required so we know who to contact with questions and decisions.

Step 3 – Enter Referring Source Information

In the fields that open when you select "I am NOT the patient":

1. Enter your **first name** and **last name**.
2. Enter your **phone number**.

3. In the **email** field, enter **your email** or the email of the person who should receive updates.
    - ***Do not enter the patient's email here.***
    - All confirmations, requests for more information, and the final decision will go to this email address.

Step 4 – Enter Patient Details

Complete all required patient information, including:

1. Patient first and last name
2. Date of birth
3. Social Security number (if available)
4. Mobile phone number
5. Sex
6. Address
7. Primary care provider (if known)
8. Insurance information (primary and secondary, if applicable)

Under **Referring Provider / Entity**, list the name of your:

- Agency / Program / Hospital / Facility

Step 5 – Upload Required Documents

In the **Upload Documents** section, you will see slots for:

- ID (driver's license or other photo ID)
- Primary, secondary, and tertiary insurance cards
- Medical documents (H&P, biopsych, doctor's notes, medication list, etc.)
- Other documents

You have up to **six** upload slots in total:

- Three under **Medical Documents**

- Three under **Other Documents**

Upload all relevant documents you have, especially medical records and insurance cards.

When finished, click **Next**.

If you are unable to upload any of the required documents directly into AdvancedMD, please fax the missing paperwork to **855-710-7852**. The Admissions team will attach the documents to the patient's chart on our end.

Step 6 – Consent and Reason for Visit

1. A **Consent** window from AdvancedMD will appear.
    - Read and click **Accept**, then click **Next**.
2. On the **Reason for Visit** page:
    - Select the available option for **Rendering Provider**.
    - Select the available **Reason for Visit**.
3. Under **Facility**, choose the program location you are referring to.
    - Make sure you select the correct program.

In **Additional Details**:

- Enter the **discharge date**
- Add any other information you want the Admissions team to know right away.

Click **Submit** to complete Part 1.

Part 2 – Complete the Agency Referral Microsoft Form

Step 7 – Watch for the Confirmation Email

Within one to two minutes after submitting in AdvancedMD, you will receive an email from **Veterans Inc.** with the subject:

"Confirmation of Referral Submission – Additional Information Needed."

This email is sent to the address you entered in the **email** field in AdvancedMD.

Step 8 – Open and Complete the Agency Referral Form

1. In the confirmation email, click on the link to the **Agency Referral Form** (direct link: https://forms.office.com/r/defUnjncEf).
2. A **Microsoft Form** will open in a new window.
3. Complete all required fields with the requested information.

This form collects additional details needed for a full and accurate referral review.
*The Admissions team **cannot** begin the review until this form is submitted.*

Step 9 – Submit the Agency Referral Form

1. After filling out the Microsoft Form, click **Submit**.
2. You will see a confirmation page that your Agency Referral Form has been submitted.

At this point, both parts of the referral submission are complete, and the Admissions team can begin the review.

After Submission – Notifications and Decisions

Step 10 – Referral Review Completed

Once the clinical and medical review is done, you will receive an email with the subject:

"Referral Review Completed."

This confirms that the review itself has been completed.

Step 11 – Final Decision and Next Steps

Shortly after the "Referral Review Completed" message, you will receive a separate email from the **IH Admissions** inbox that will:

- Provide the **referral decision**
- Outline **next steps** if the referral is accepted
- Or provide the **reason for denial** if the referral cannot be accepted

All communication will go to the email address you entered when you selected **“I am not the patient”** in AdvancedMD.

Summary

To successfully submit a referral:

1. Complete the **AdvancedMD referral form** and upload all documents.
2. Watch for the **confirmation email** from Veterans Inc. and complete the linked **Agency Referral Microsoft Form**.
3. Monitor your email for the **review completed** notice and the **final decision** from IH Admissions.

Missing documents?
If you cannot upload your paperwork in AdvancedMD, please fax all missing documents to 855-710-7852.