

# ICF/MR

**Quick Reference Guide** for  
State Facilities, SOCS, and  
Community MHMR Centers

*For more detailed information about these and other procedures please refer to the ICF/MR User Guide.*

## Accessing ICF/MR 3270-Based Applications

1. On the MHMR-NET screen key your User ID in the USERID field.
  2. Tab to the PASSWORD field and key your password
  3. Press **Enter**.
  4. Read the TXMHMR NETPASS Broadcast screen for messages concerning system availability.
  5. Press **Enter**.
  6. Review the NET-PASS Activity Table.
  7. Press the appropriate PF key assigned to CARE.
  8. On Page 2 press **Enter**.
  9. On the CARE Access Verification Screen key your social security number.
  10. Press **Enter**.
  11. On the CARE Access Verification Display screen press **Enter**.
  12. On the M: CARE Main Menu screen key **1100** in the ACT: field.
  13. Press **Enter**.  
Result: The 1100: ICF/MR Menu is displayed.
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## Exiting ICF/MR – Mainframe/3270

1. Key **Q** in the ACT: field.
  2. Press **Enter**.
  3. Key **logoff** at the prompt.
  4. Press **Enter**.
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## Changing Your Password

1. On the MHMR-NET screen key your User ID in the USERID field.
2. Tab to the PASSWORD field and key your password.

## Changing Your Password, Continued

3. Tab to the NEW PASSWORD field and key a new password.
  4. Tab to the < = > field and key the new password again.
  5. Press **Enter**.  
Result: The TXMHMR NETPASS Broadcast screen is displayed.
  6. Press **Enter**.  
Result: A NET-PASS Mail Services screen is displayed with the message, “*Password Changed.*”
  7. Press **Enter** to continue to the NET-PASS Activity Table.
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## Client Name Search

1. From the M: CARE Main Menu, key **100** in the ACT: field.
2. Press **Enter**.
3. On the Client Name Search screen key the consumer’s last name and first initial.
4. Press **Enter**.
5. On the Client Name Display screen there are several options to determine if the consumer is already registered in the CARE system. To review the data:
  - Key **102** to display the Extended Name Display screen, or
  - Key the line number to display the Name Search: Summary Client History screen. From this screen, keying **104** will allow you to access the Name Search: Detail Client History screen.

## Client Name Search Continued

- Press **Enter**.

Note: If you determine that the consumer is registered in CARE, update the consumer’s demographic data. If you determine that the consumer *has not* been previously registered in CARE, then you must register the consumer.

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## Client Registration

1. Key **325** in the ACT: field of any screen.
  2. Press **Enter**.
  3. On the 325: Register Client: Client ID screen key information in the appropriate fields.
  4. Press **Enter** to submit the data.
  5. On the second 325: Register Client: Client ID screen key **Y** in the READY TO ADD? field.
  6. Press **Enter**.  
Result: The message, “*Previous Information Added*” is displayed.
  7. On the 325: Register Client: Correspondent Data screen key information in the appropriate fields.
  8. Key **Y** in the READY TO ADD RECORD? field.
  9. Press **Enter**.
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## Campus-based Client Movement - Admission

1. On the 1100: ICF/MR Menu key **305** in the ACT: field.
2. Press **Enter**.
3. On the 305: Campus-based Assignment: Add/Change/Delete request screen key information in the CLIENT ID or LOCAL CASE NUMBER field.

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### Campus-based Admission, Continued

4. Key **A** in the TYPE OF ENTRY field.
5. Press **Enter**.
6. On the 305: Campus Based Assignment: Add screen key information in the appropriate fields.  
**Note:** If Absence for Trial Placement (ATP), key the Destination Component Code and **Y** (Yes) or **N** (No) to indicate if the person is going to a nursing home.  
**Note:** If Residential Reassignment (RR), key the Destination Ward/Dorm.  
**Note:** If MH location admission (ADM), key the County of Admission.
7. Key **Y** in the READY TO ADD? field.
8. Press **Enter**.

**Result:** The message “*Previous Information Added*” is displayed.

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### Campus-based Client Movement - Discharge

1. On the 1100: ICF/MR Menu key **310** in the ACT: field.
2. Press **Enter**.
3. On the 310: Campus-based Discharge/Community Placement: Add/Change/Delete request screen key information in the CLIENT ID or LOCAL CASE NUMBER field.
4. Key **A** in the TYPE OF ENTRY field.
5. Press **Enter**.
6. On the 310: Campus-based Discharge/Community Placement: Add screen key information in the appropriate fields.
7. Key **Y** in the READY TO ADD? field.
8. Press **Enter**.

**Result:** The message, “*Previous Information Added*” is displayed.

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### Community Client Movement Procedure

1. To add a state operated community client movement, on the 1100: ICF/MR Menu key **336** in the ACT: field.
2. Press **Enter**.
3. On the 336: State Operated Client Movements: Add/Change/Delete request screen key information in the CLIENT ID, SOCIAL SECURITY NUMBER, or LOCAL CASE NUMBER field.
4. Key **A** in the TYPE OF ENTRY field.
5. Press **Enter**.
6. On the 336: State Operated Client Movements: Add screen key information in the appropriate fields.

**Note:** For admission/return, key the previous residential setting; for discharge, key the residential setting to which the person is going.

**Note:** If admitted from or discharged to a hospital or private pay facility, key the date of admission to that facility.

7. Key **Y** in the READY TO ADD? field.
8. Press **Enter**.

**Result:** The message, “*Previous Information Added.*” is displayed.

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### Non-State Operated Client Movement Procedure

To add a non-state operated client movement:

1. On the 1100: ICF/MR Menu key **337** in the ACT: field.
2. Press **Enter**.
3. On the 337: Non-State Operated Client Movements: Add/Change/Delete request screen key information in the CLIENT ID, SOCIAL SECURITY NUMBER, or LOCAL CASE NUMBER field.
4. Key **A** in the TYPE OF ENTRY field.
5. Press **Enter**.

### Non-State Operated Client Movement Procedure, Continued

6. On the 337: Non-State Operated Client Movements: Add screen key information in the appropriate fields.

**Note:** For admission/return, key the previous residential setting; for discharge, key residential setting to which the person is going.

**Note:** If admitted from or discharged to a hospital or private pay facility, key the date of admission to that facility.

7. Key **Y** in the READY TO ADD? field.
8. Press **Enter**.

**Result:** The message, “*Previous Information Added*” is displayed.

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### MR/RC Assessments Using Mainframe/3270

1. From the 1100: ICF/MR Menu key **1123** in the ACT: field.
2. Press **Enter**.
3. On the 1123: ICF MR/RC Assessment: Add/Chg/Del request screen key information in the CLIENT ID, LOCAL CASE NUMBER, or MEDICAID NUMBER field.
4. Key the Contract Number in the CONTRACT NO field.
5. Key the Purpose Code in the PURPOSE CODE field.
6. Key **A** in the TYPE OF ENTRY field.
7. If you are adding a new assessment, you must key the requested begin date in the REQUESTED BEGIN DATE field.
8. If you are adding a Purpose Code E assessment, you must key the requested end date in the REQUESTED END DATE field.

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## MR/RC Assessments, Continued

### 9. Press **Enter**.

The 1123: ICF MR/RC Assessment Purpose Code 2: Add screen allows you to view client information and available MR/RC record information.

### 10. Press **Enter** to continue.

On the 1123: ICF MR/RC Assessment Purpose Code 2: Add (Screen 2):

### 11. Key information in the appropriate fields.

### 12. Press **Enter**.

The 1123: ICF MR/RC Assessment Purpose Code 2: Add (Screen 3) allows you to view diagnosis descriptions for primary, medical, and psychiatric diagnoses.

### 13. Press **Enter** to continue.

On the 1123: ICF MR/RC Assessment Purpose Code 2: Add (Screen 4):

### 14. Key information in the appropriate fields.

### 15. Press **Enter**.

On the 1123: ICF MR/RC Assessment Purpose Code 2: Add (Screen 5):

### 16. Key information in the appropriate fields.

### 17. Press **Enter**.

On the 1123: ICF MR/RC Assessment Purpose Code 2: Add (Screen 6):

### 18. Key information in the appropriate fields.

### 19. Press **Enter**.

On the 1123: ICF MR/RC Assessment Purpose Code 2: Add (Screen 7):

### 20. Key information in the appropriate fields.

### 21. Key **Y** (Yes) or **N** (No) in the READY TO SEND FOR AUTHORIZATION? field to indicate whether or not you are ready to send the MR/RC Assessment to Utilization Review (UR) at Central Office.

## MR/RC Assessments, Continued

22. Key **Y** (Yes) or **N** (No) in the READY TO ADD? field to indicate whether or not you are ready to add the record. You may want to add the record pending further modifications even if you are not ready to send it for authorization by UR.

### 23. Press **Enter**.

**Result:** The 1123: ICF MR/RC Assessment: Add/Chg/Del request screen is displayed with the message, "Previous Information Added."

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## ICF/MR Work Processes

### Three basic work processes:

- Client registration in CARE
  - Client movement entry
  - MR/RC assessment entry
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### Registration of New Consumers

- Use Action Code 325 through the mainframe/3270 to register a consumer.
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### Previously Registered Consumers

- Use Action Codes 410, 413, 420, 430, and 431 to update Consumer demographics.
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### If the consumer previously resided in an ICF/MR facility:

If the consumer has a current MR/RC Assessment:

- Use Action Code 410 to add a Local Case Number if one has not been assigned.
  
- Use Action Code 305 (state operated campus-based providers), or Action Code 336 (state operated community providers), or Action Code 337 (community MHMR centers) to enter a client movement (admission).

## Consumer previously resided in an ICF/MR facility, Continued

If the consumer has no MR/RC Assessment:

- Use Action Code 410 to add a Local Case Number if one has not been assigned.
  - Use Action Code 305 (state operated campus-based providers), or Action Code 336 (state operated community providers), or Action Code 337 (community MHMR centers) to enter a client movement (admission).
  - Use Action Code 1123 to enter an MR/RC Assessment.
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## Client Movements

- To enter a state operated *campus-based* client movement, use Action Code 305 to enter assignments and Action Code 310 to enter discharges.
  - To enter a state operated *community* client movement, use Action Code 336 to enter client movements.
  - To enter a community center client movement, use Action Code 337 to enter client movements.
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### When a consumer is discharged from an ICF/MR facility:

- Use Action Code 310 (state operated campus-based providers), or Action Code 336 (state operated community providers), or Action Code 337 (community MHMR centers) to enter the discharge.
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**When a consumer transfers from one ICF/MR component to another:**

- Use Action Code 310 (state operated campus-based providers), or Action Code 336 (state operated community providers), or Action Code 337 (community MHMR centers) as follows:
- The provider from which the consumer leaves enters the discharge.
- The provider that admits that same consumer enters the admission.

Note: The consumer's MR/RC Assessment transfers with him/her. The new provider should look at Action Code 1168 to see when the consumer's next MR/RC Assessment is due.

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**Process Order New ICF/MR Consumers**

If the consumer is a new ICF/MR consumer and will be admitted in two weeks:

- Use Action Code 325 through the mainframe or Action Code 326 through the Web to register the consumer.
- Use Action Code 1123 to enter an MR/RC Assessment.
- Use Action Code 305 (state operated campus-based providers), or Action Code 336 (state operated community providers), or Action Code 337 (community MHMR centers) to enter a client movement (admission) when the consumer is actually admitted.

If the consumer is a new ICF/MR consumer and was admitted last week:

- Use Action Code 325 through the mainframe/3270 or Action Code 326 on the Web to register the consumer.
  - Use Action Code 305 (state operated campus-based providers), or Action Code 336 (state operated community providers), or Action Code 337 (community MHMR centers) to enter a client movement (admission).
  - Use Action Code 1123 to enter an MR/RC Assessment.
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