

DISCHARGE PLANNER INSTRUCTIONS FOR REFERRING ONLINE

Welcome to the DAAS Intake Tool for the San Francisco Transitional Care Program (SFTCP), In-Home Supportive Services (IHSS), and Home Delivered Meals (HDM). After successfully logging in to <https://ir2.sfgetcare.com>, please follow the steps below to complete a new referral.

1. To create a new referral, click the **Add New Consumer** button. Complete the consumer record and click **Save**. Please note that the following consumer information are required:

- First and Last Name (Must be exactly as it appears on the Medicare card)
- Date of Birth
- Primary Language and English Fluency
- Address
- Phone Number

2. Click on the referral(s) you want to start (e.g. SFTCP, IHSS, HDM). You can work on a referral for one or more of these programs at the same time. Please complete the referral(s) as fully as possible. There are specific required sections for each referral. All referrals require:

- Referent Information
- Residence/Discharge Information
- Functional Ability
- Service Needs (required IHSS referrals only)

For SFTCP referrals, additional required sections are:

- Is consumer enrolled in Medicare Part A or Medicare Part B?
- Medicare Number (Must be exactly as it appears on the Medicare card including suffixes)

For HDM referrals, additional required sections are:

- Meal Request
- Home-Delivered Meals Contact
- Environment
- Summary/Comments

For IHSS referrals, additional required sections are:

- Spouse Information
- Circumstances
- Support Network

3. If you would like to leave the site and continue to work on the referral later, hit the **Save Changes for Further Edits** button. The next time you log in, you can search for the client by name, ID Number, SSN, or DOB and continue with the referral.

4. When you have completed the referral, select the **Submit Intake to DAAS** button. This will send your referral to the DAAS Intake Team and you will no longer be able to view it. A confirmation email will be sent for successful submission of referrals. DAAS Intake will review the referral and contact you if additional information is needed. If you have any questions, please contact the DAAS Intake Team at (415) 355-6700, thank you.