

Optum JELS

NOTE: Our case management system is moving from Child Welfare Services/Case Management System (CWS/CMS) to Child Welfare Services-California Automated Response and Engagement System (CWS-CARES). This policy includes language, forms/templates, and resources that will be reviewed and updated as we transition into CWS-CARES.

(Created 09/04/26)

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Related Policies

Additional information can be found in the following policies:

- Mental Health Treatment and Services
- Mental Health Evaluations
- ERMS and Records Management
- Mental Health Services- Payment Authorizations

Forms

This policy references the following forms:

- 04-176/04-177 (CWS/CMS template) Initial Treatment Plan/Treatment Plan Update
 - 04-176A (CWS/CMS template)- Parent or Child Mental Health Referral Form
 - 04-178 (CWS/CMS template)- Referral for Mental Health Evaluation
 - 04-181- Child Physical Abuse Treatment: Learning How to Safely Parent Intake Assessment
 - 04-181A- Child Physical Abuse Treatment Quarterly Progress Report
 - 04-182- Intimate Partner Violence Victim Treatment: Intake Assessment
 - 04-182A- Intimate Partner Violence Victim Treatment: Quarterly Progress Report
 - 04-183- Sexual Abuse Protection: Parent Treatment (Non-Protecting Parents) Intake Assessment
 - 04-183A- Sexual Abuse Protection: Parent Treatment (Non-Offending/Non-Protecting Parents) Quarterly Progress Report
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Resources

The policy references the following resources:

- Optum JELS Staff Roster
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Introduction

The Optum JELS site is accessed by both CFWB Optum JELS staff and Optum to process referrals and payment authorizations for mental health services submitted by the social worker (SW) including mental health evaluations, group therapy, individual therapy, or conjoint therapy treatment.

Once a referral is received, Treatment Evaluation Resource Management (TERM) reviews and sends it to the appropriate TERM mental health provider, manages payment for services, and forwards reports completed by the TERM provider back to CFWB. Assigned Optum JELS staff are primarily responsible for uploading referrals to JELS, downloading reports from JELS and distributing to the SW and/or Supervisor.

Optum JELS is not used for report storage by either Optum or CFWB. There is a 60-day retention on documents in Optum JELS once Mental Health Referrals have been accepted by Optum TERM. Optum JELS staff must remove any non-active referrals in Optum JELS.

NOTE: The Optum JELS site is different than the Court JELS site. Only Optum JELS staff have access to the Optum JELS site.

Processing New Mental Health Referrals in Optum JELS

SWs initiate referrals for mental health treatment services by completing the appropriate referral form, 04-176A TERM Mental Health Referral or 04-178 Mental Health Evaluation, in accordance with the [Mental Health Payment Authorization Policy](#).

The information below describes how approved referrals are transmitted through the Optum JELS database. Once the referral form is reviewed and signed by the Protective Services Supervisor (PSS), the SW submits the signed form to the program's designated Optum JELS staff ([see the Optum JELS Staff Roster](#) for office/program assignment).

Optum JELS staff upload referral form (04-176A TERM Mental Health Referral or 04-178 Referral or Mental Health Evaluation) to Optum JELS by initiating a referral "new item" dialogue with Optum TERM. The referral item holds key information about the referral itself. The following subject lines must be entered with every new referral:

- Client's Last Name
 - Client's First name
 - Referral Type (individual, conjoint, family, group or evaluation)
 - Document type
 - Status
 - Case Number (DSS Number)
 - Region/Program
 - Office Assistance (enter Office Assistant Back-up if applicable)
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**Processing New
Mental Health
Referrals in
Optum JELS
(cont.)**

- PSW
- PSS
- Select the assigned CFWB Staff Psychologist
- Behavioral Health Coordinator
- Mental Health Policy Analyst

Once the information above is entered, attach the pdf file to the new item and submit.

**Returned
Referrals**

Optum TERM does not reject referrals. Instead, Optum TERM may return mental health referrals for reasons such as clinical concerns or missing, incorrect, or inconsistent information. For a full detail of processing referrals, see the [Mental Health Services- Payment Authorization policy](#). The flow chart below outlines the steps to follow for a resubmission to TERM via Optum JELS.

Step	Who	Action
1	TERM	• Send an email notifying the assigned CFWB SW, supervisor, staff psychologist, and Optum JELS staff that the referral requires follow-up. • TERM will identify the reason for the return by selecting the applicable status in the Optum JELS item, such as: ○ Optum Update: Clinical Consultation Needed ○ Optum Update: Incomplete ○ Duplicative Referral – Active Authorization Exists
2	SW	Address the reason for the return referral. • If clinical concern, consult with staff psychologist to determine appropriateness • If incomplete, correct the form issues. Consult with Mental Health Policy Analyst as needed • If duplicative referral- consult with TERM clinician about active authorization. If needed, ask TERM to resend the active authorization to the provider. Once corrections are made and supervisor signature is obtained, submit the referral to Optum JELS staff.
3	Optum JELS Staff	Upload to Optum JELS as a new item and select the status as CWS Resubmission.
4	TERM	Process new referral. If no corrections needed: • Select: Processing in Optum JELS • Select: Approved once match is made • If concerns remain, go back to step 1.

**Returned
Referrals
(cont.)**

NOTE: If SW decides to rescind TERM referral, TERM selects the status “Rescinded by CWS” in Optum JELS. This sends the notification to TERM staff.

**Processing
Group Mental
Health Reports**

Starting January 2025, Optum TERM tracks all group progress reports (offender, non-protecting parent and victim). Optum TERM will provide quality oversight only for Intimate Partner Violence Victim and Child Sexual Abuse Non-Protecting Parent group reports, as well as those receiving individual therapy.

Offender group providers use their own intake/progress report template and send it to TERM; however, they will use a TERM Group Therapy Progress Report Face Sheet.

The following abbreviations are used to identify service type and report status on the TERM Group Therapy Progress Report Face Sheet:

Service Type Abbreviations:

- I = Intake
- U = Update
- D = Discharge

Report Type Abbreviations:

- Child Abuse = CAI, CAU, CAD
- Domestic Violence Offender = DVOI, DVOU, DVOD
- Domestic Violence Victim = DVI, DVU, DVD
- Sexual Abuse Non-Protecting Parent Group = NPPI, NPPU, NPPD
- Sexual Abuse Offender = SAOI, SAOU, SAOD
- Individual/Conjoint = ITP, TPU, DS

Optum JELS staff will upload all treatment reports ([e.g. 04-176](#), [04-177](#), [04-182](#), [04-182A](#), [04-183](#) and [04-183A](#) and offender reports) from Optum JELS to Court JELS to ensure all stakeholders have real-time access to reports. A user guide is available to walk Optum JELS staff through these steps.

NOTE: If the Child Abuse Group providers use the [04-181](#) Child Physical Abuse Treatment and [04-181A](#) Child Physical Abuse Treatment Quarterly Report.

**Documentation
of Progress**

The table below shows how treatment reports are received and processed through Optum JELS:

Step	Who	Action
1	TERM	• Provide quality oversight for Intimate Partner Violence Victim and Child Sexual Abuse Non-Protecting Parent reports and individual therapy. • Track offender group reports. • Upload the treatment report to CFWB Optum JELS as they become available.
2	CFWB JELS Office/ Program Designated Staff	• Log into Optum JELS site daily to check for uploaded documents • View specific office/program section • If documents have been uploaded, confirm the assigned SW and office/program before processing the document. If still in region/program, continue processing, if SW is not in region/program, send the documents to the correct region/program in the Optum JELS database • Download documents from CFWB Optum JELS, save in designated folder, and create new file name: ○ Change file name to: last name, first name, report type, and date (e.g.: Smith,Joan-ITP-01012015.pdf) • Email document to SW and PSS and upload into the Electronic Records Management System (ERMS). See ERMS policy for further information. • Delete document from JELS once all tasks have been completed. (Place cursor near the document title to be deleted. A drop-down arrow appears to the right. Select "Delete.") NOTE: In July 2025, a new Dual Program folder was created for youth involved with both Probation and CFWB. These evaluations are time-sensitive and must be sent to the assigned SW and Supervisor immediately, who will then forward them to the assigned Probation Officer.

**Authorizations
Due to Expire
(ADE) Report**

Optum TERM generates the Authorization Due to Expire (ADE) report on the 15th of each month to renew authorizations that are CFWB Funded. The report is uploaded to Optum JELS, where each office/program's Optum JELS staff can access and review it. This is a time-sensitive report that must be completed promptly to ensure timely re-authorizations.

Full procedures, timelines, and roles are outlined in the [Mental Health Services- Payment Authorization Policy](#).

NOTE: If the office/program does not show up on Optum JELS ADE section, no ADE report is needed for that month.

**Alignment with
SET**

This policy supports [SET Value 4](#), Shared Responsibility with Community Partners, by enhancing communication between CFWB and Optum TERM to better meet the needs of families served.
