
OpenBeds® Crisis Management System

Mobile Crisis Unit (MCU) Team Member User Guide

Revised 8/5/2024

Introduction

This guide details the responsibilities and distinct privileges for OpenBeds users with the role of Mobile Crisis Unit (MCU) team member.

MCU team member is the role assigned to staff who are responsible for responding to mobile crisis dispatch requests. Using this role, mobile responders will be able to:

1. View an assigned dispatch and either accept, decline, or reassign it.
2. Complete the Mobile Crisis Unit Response Report and disposition the dispatch.
3. Flag an encounter for follow-up and complete the follow-up as assigned.
4. Track status of dispatch not resolved on site.

Note: *Items highlighted in yellow should be customized based on your state and applicable business rules.*

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Account Creation

MCU team members are created by organizational users with the Crisis Administrator role. Your supervisor can assist with user account creation. Your Administrative Team can reach out to Bamboo Health's help desk if additional *Crisis Administrator* accounts are needed.

Logging In

To log into your account for the first time:

1. From your web browser, navigate to the OpenBeds URL: <https://<<your state's abbreviation>>.openbeds.net/> and select "Forgot Password".
2. Enter your work email in the 'Username' box and click 'Request Password'.
3. Enter the verification code sent to your email in the 'Verification Code' box.
4. Create a new password and click 'Reset Password'.
5. Log in using your credentials.

For subsequent log ins:

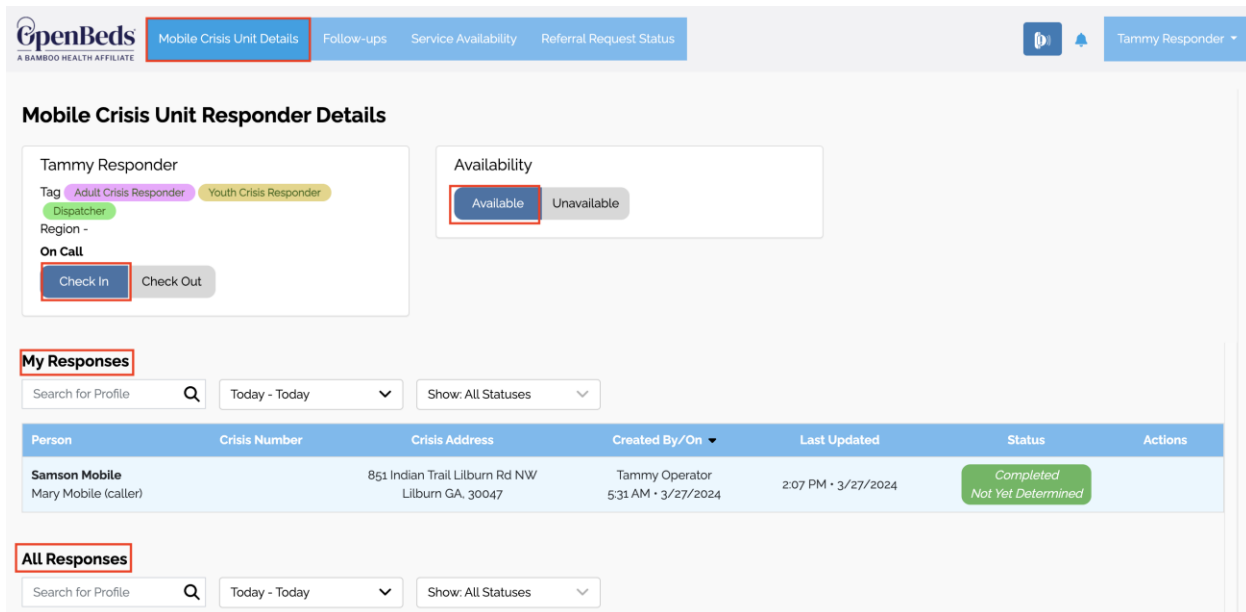
1. From your web browser, navigate to the OpenBeds URL: <https://<<your state's abbreviation>>.openbeds.net/>.
2. Enter your work email in the 'Username' box and your password in the 'Password' box.
3. You can change your password at any time. Once logged in:
 - a. Click the drop-down icon beside your name at the top right of the page.
 - b. Select 'Change Password' and complete the instructions as prompted.

Getting Started

1. Navigate to <https://<<your state's abbreviation>>.openbeds.net/> and log into OpenBeds.
2. You will see a 'Select An Account' page listing one or more accounts associated with your work email address.
3. Select your 'MCU team member' role.



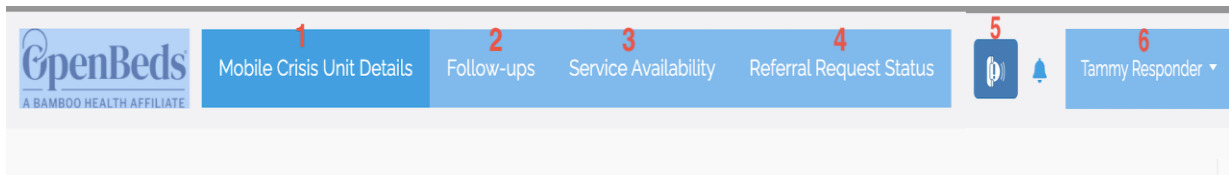
Upon logging in you have several options to choose from.



Respond to a Dispatch Request

Upon login, you are defaulted to the **Mobile Crisis Unit Details** page where you will update your status and availability. Be sure to **Check in** at the start of each workday and **Check out** at the end of your workday. While checked in, to signal that you are

available for a dispatch, toggle your Availability to **‘Available’**. Your availability will automatically change to ‘Unavailable’ once you accept a dispatch and change back to ‘Available’ after you complete that dispatch. You can also view all your dispatches in the ‘My Responses’ section and those of your organization in the ‘All Responses’ section on this page based on the date range specified. This information auto defaults to ‘Today’.



Mobile Crisis Unit Details (1) – See description above.

Follow-ups (2) – the follow-ups tab has details of all encounters that have been assigned to you or flagged by your organization for follow-up. [Refer to the Follow-ups section for more information.](#)

Service Availability (3) – the service availability tab opens the OpenBeds referral management system and has options for searching and connecting with various providers based on an array of parameters. [Refer to the Refer to Treatment Provider\(s\) section for more information.](#)

Referral Request Status (4) – this is where you can see all referrals that have been made and the status of them.

Telephone Icon (5) – the telephone icon is found on every tab in the system and connects you to the NENA integrated database for emergency services contact information in the event you need to execute an active rescue/emergency services intervention. [Refer to the Active Rescue/Emergency Services Intervention section for more information.](#)

Username (6) – you can view your profile, change your password, and access educational and other materials from the dropdown options.

When you are requested for a dispatch, you will receive a pop-up to View/Acknowledge it before any Protected Health Information (PHI) is visible.

Behavioral Health Emergency Services Program : MCU team member

OpenBeds A BAMBOO HEALTH AFFILIATE

Mobile Crisis Unit Details | Follow-ups | Service Availability | Referral Request Status

Tammy Responder

Mobile Crisis Unit Responder Details

Tammy Responder

Tag: Adult Crisis Responder, Youth Crisis Responder, Dispatcher

Region -

On Call

Check In | Check Out

Availability

New Mobile Crisis Unit Assignment

[4975 Jimmy Carter Blvd](#)
[Norcross, GA 30093](#)

View / Acknowledge

My Responses

Search for Profile

Today -

Person	Crisis Number	Crisis Address	Created By/On	Last Updated	Status	Actions
Turpentine Tamson Turpentine Tamson (caller)	(000) 000-0000	4975 Jimmy Carter Blvd Norcross GA, 30093	Tammy Operator 1:39 PM • 2/20/2024	2:59 PM • 2/20/2024	Requesting	

All Responses

Search for Profile


Today - Today

Show: All Statuses



Clicking on **View/Acknowledge** will take you to the **Mobile Crisis Unit Response Report** Profile tab with the Intake Form completed by the Crisis Operator requesting the dispatch.

Dispatch Request Decisioning

From the **Mobile Crisis Unit Response Report** Profile tab, you can **Decline**, **Reassign** or **Accept** the dispatch depending upon your organization's business rules.




[Mobile Crisis Unit Details](#)
[Follow-ups](#)
[Service Availability](#)
[Referral Request Status](#)





Tammy Responder ▾

Mobile Crisis Unit Response Report


Profile

 [Export as PDF](#)
Respond to Crisis?
☐ Accept
☐ Decline



Colonial Dispatch


50



Caller

Call Start Time

11:02 AM • 3/20/2024




Crisis Location

142 Flat Shoals Ave SE
Atlanta, GA 30316

Phone

-

 Edit

☒ Adult

Contact Resolutions

Mobile Crisis Team Deployed

Incident Details

Primary Presentation

Mental Health

Dispatch Level

4

Law Enforcement Recommended

No

Reason for Deferral

Request Type

Urgent

Person History

Impairments

Needs an Interpreter?

No

Medication

None

Person of Concern's Mental Health History

None

History of Hospitalizations, Placements, Institutional Stays

None

Trauma History


None

Other History



Manage Responders

After accepting the dispatch, navigate to the **Mobile Crisis Unit Details** page to build your response team. Click **Manage Responders** in the 'Actions' column.

Behavioral Health Emergency Services Program | MCU team member



[Mobile Crisis Unit Details](#)
[Follow-ups](#)
[Service Availability](#)
[Referral Request Status](#)

Gina Responder ▾

Mobile Crisis Unit Responder Details

Gina Responder

Tag

Adult Crisis Responder

Youth Crisis Responder

SNR 11811 • 73391

Specialties

Youth, IDD, Autism

Response Types

Telerequest, Telephonic, In Person

On Call

Availability

My Responses

Search for Profile

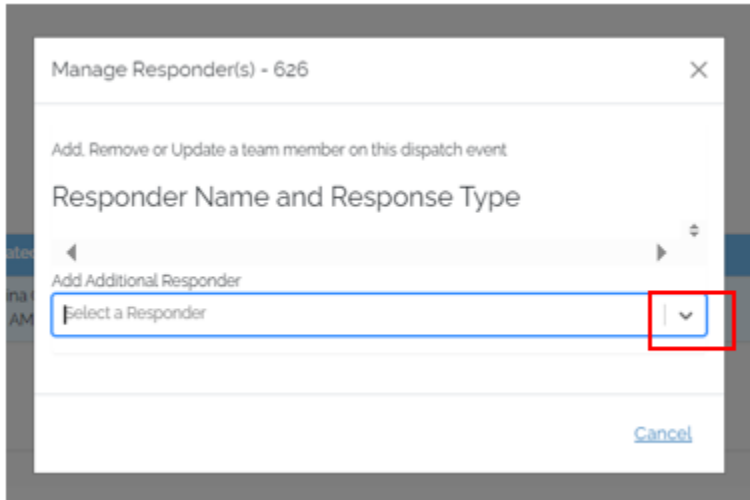
Q

8/1/2024 - Today

Show: All Statuses

Person	Crisis Number	Crisis Address	Created By/On	Last Updated	Responders	Status	Actions
Ima Test		1870 Highway 81 E Macon, GA 31206	Gina Operator 11:41 AM • 8/1/2024	2:28 PM • 8/2/2024		On Route	<input type="button" value="Decline"/> <input checked="" type="button" value="Manage Responders"/>
				2:28 PM • 8/2/2024	Gina Responder	On Route	<input type="button" value="Decline"/> <input checked="" type="button" value="Manage Responders"/>

Select one or more additional available responders to add to this dispatch using the pop-up screen displayed. Added responders will be notified they have been added to the dispatch and will be able to access and edit the **Mobile Crisis Unit Response Report**.



All activity is captured on the **Mobile Crisis Unit response Report** Mobile Unit tab in the **Manage Responder(s)** audit log.

Mobile Crisis Unit Response Report

[Profile](#)
[Mobile Unit](#)

Mobile Unit Status

Please select your current unit status. It will be automatically time stamped.

Arrived

11:35 AM • 6/21/2024

Departed

11:47 AM • 6/21/2024

Manage Responder(s)

Add, Remove or Update a team member on this dispatch event

Responder Name and Response Type

Robert MCU1

Select a Response Type

x

Gina MCU Test

In Person

Add Additional Responder

Select a Responder

Responders Audit Log

Responder Name	Action By	Action	Date and Time	Response Type
Robert MCU1	Gina MCU Test	+	12:09 PM - 07/01/2024	
Gina MCU Test	Gina MCU Test		12:08 PM - 07/01/2024	In Person
Gina MCU Test	Gina MCU Test		12:08 PM - 07/01/2024	Telephonic
Gina MCU Test	Gina MCU Test		12:08 PM - 07/01/2024	Telehealth
Gina MCU Test	Gina MCU Test	+	12:08 PM - 07/01/2024	

Capture Scene Information

This section captures information related to the meeting location. You can document the Number of First Responders, whether Law Enforcement was on scene when the MCU arrived, and the presence of Family Support. Dispatch Level is also displayed.

Scene Information

Number of First Responders **1**

Law Enforcement at scene before our mobile crisis team? **2**

☐ Yes
 ☒ No

Family Support **3**

☐ Yes
 ☒ No

Dispatch Level **4**

Number of First Responders (1) – This is to indicate the number of first responders on scene at any time during the dispatch. Clarify this information in your dispatch summary.

Law Enforcement at Scene before our mobile crisis team? (2) – Choose Yes or No.

Family Support (3) – Choose Yes or No to indicate if the person in crisis has family support present at the time the mobile crisis unit arrives or anytime while on scene. Expand upon this in your dispatch summary.

Dispatch Level (4) – The dispatch level defaults to what was entered by the crisis operator. The mobile crisis unit can change the dispatch level based on information at the scene and business rules.

You can add narrative information related to the assessment completed by the mobile crisis unit and elaborate on any scene information as needed. It allows up to 65,000 characters.

Dispatch Summary

Start typing your note here

Maximum 65000 characters (65000 remaining)

Clear
Save note

Note History

STARRED NOTES

Filter Notes

☆

Tammy Responder | Behavioral Health Emergency Services Program | 11:35 AM • 3/20/2024
DISPATCH SUMMARY

Mobile team arrived at Dog Park Cafe and met with individual in crisis. Assessment completed onsite. He reports increase in symptoms of anxiety and depression over last few weeks. He has recently been trying to think of reasons to stay alive but repo ...

×

Edit Profile

If the demographic information captured during the intake needs to be edited or added to once on scene, you can do so by clicking the 'Edit' link on the 'Profile' tab on the **Mobile Crisis Unit Response Report**.

Behavioral Health Emergency Services Program - MCU team member

OpenBeds
Mobile Crisis Unit Details
Follow-ups
Service Availability
Referral Request Status

Gina Responder

Mobile Crisis Unit Response Report

Profile
Mobile Unit
Export as PDF
Update
Submit and Close Session
Reassign

Ima Test
Caller

Call Start Time
10:53 AM - 5/1/2024

Crisis Location
1270 Highway 16 E
Macon, GA 31202

Phone

Edit

Make the applicable changes in the expanded section and **Save**.

Person Details

(If configured for your state) Instead of making changes to the information gathered at intake, navigate to the 'Mobile Unit' tab on the Mobile Crisis Unit Response Report and complete the **Person Details** section.

Encounter Details

(If configured for your state) Complete the applicable portions of the **Encounter Details** section.

Encounter Details	
Primary Presentation <input type="text" value="Select multiple option(s)"/>	Referral Source <input type="text" value="Select an option"/>
Contributing Factors <input type="text" value="Select multiple option(s)"/>	
Protective Services Report	
Type of Abuse <input type="text" value="Select an option"/>	
Was a report made by the center to protective services (adult/child) based on call content? <input type="text" value="Select an option"/>	Did the Lifeline Center assist the caller in making a direct report to protective services? <input type="text" value="Select an option"/>

Accommodation

Document any ADA accommodation provided to the individual in crisis during your dispatch. This also informs any requirements if you need to coordinate additional care/support for this individual.

Active Rescue/Emergency Intervention Services

If the person in crisis poses an imminent threat to self or others, initiate **Active Rescue/Emergency Intervention Services**. Click the telephone icon in the top right corner of the screen to search the NENA integrated **Emergency Services** directory to determine the closest and most appropriate emergency responder and contact accordingly.

Emergency Services

Search: Atlanta, GA 30314

Search Results

Atlanta E 911

Contact Information
 404-658-6666 - Wireline
 404-658-6666 - Wireless

Communities Served
 City of atlanta

Instructions:
 Not provided.

Document the **Active Rescue/Emergency Intervention Services** by toggling this section on and completing the applicable fields.

Active Rescue

Active Rescue Type **1**
 Select an option

Reason for Active Rescue **2**
 Select an option

Responder Type **3**
 Select an option

Responder Name **4**
 [Text Field]

Contact Number **5**
 [Text Field]

Badge/ID Number **6**
 [Text Field]

Consent for Dispatch **7**
 Select an option

☐ Contact was successful ☐ Emergency Rescue could not locate individual ☐ Undetermined **8**

Active Rescue Type (1) – Select **Homicide**, **Suicide**, or **Welfare**.

Reason for Active Rescue (2) – Select one applicable reason from the dropdown.

Responder Type (3) – Select **Fire**, **EMS**, or **Police**.

Responder Name (4) – Enter the emergency responder’s or unit’s name.

Contact Number (5) – Enter the emergency responder’s or unit’s contact number.

Badge/ID Number (6) – Enter the emergency responder’s or unit’s badge or ID number.

Consent for Dispatch (7) – Select whether the person in crisis consented to the emergency intervention **Yes (voluntary)** or whether the Individual has not given consent **No (involuntary)**.

Contact (8) – Select the applicable radio button to indicate if emergency personnel were able to contact/locate the person in crisis.

Follow Up

The **Follow Up** section captures information related to any additional contacts needed by the mobile crisis unit for the person in crisis.

Follow Up

Person follow-up eligibility ¹

Accepted and consent given ✕ ▼

Preferred contact method* ²

Select one preferred contact method. Both fields can be filled out to have a backup contact method.

☐ Phone (preferred)

☐ Email (preferred)

Follow-up contact and date* ³

Name to ask for:

Can we leave a voicemail?* ⁴ ⓘ

☐ Yes ☐ No

Can we leave a live message?* ⁵

☒ Yes ☐ No

With whom? ⁶

Follow up due date: * ⁷

24 hrs

48 hrs

72 hrs

Follow up notes* ⁹

☐ Mark this Follow-up as completed. ¹⁰

Did the person reach out to the referrals provided? ¹¹

☐ Yes ☐ No

Person follow-up eligibility (1) The person seeking help has the option to accept and consent to follow up or to decline follow up.

Preferred contact method (2) If follow up is accepted, document the ‘Preferred contact method’ (email or phone).

Follow-up contact and date/Name to ask for (3) Enter the name to ask for.

Can we leave a voicemail? (4) Indicate whether a message can be left on voicemail

Can we leave a live message? (5) Indicate whether a message can be left with a person.

With whom? (6) If a message can be left with a person, indicate who a message can be left with.

Follow up due date (7) Enter a date and time for follow up or **(8)** Select from the follow up due date options of 24, 48, or 72 hours.

Follow-up notes (9) Document notes from the follow up.

Mark this follow-up as completed (10) If the follow-up is completed via the Mobile Crisis Unit Response Report, check the box to indicate this.

Did the person reach out to the referrals provided? (11) If the follow-up is completed via the Intake Form, select the applicable radio button.

Because follow-up is typically done separately from the initial contact, most follow-up information is documented on the **Follow-ups** page instead of in the **Mobile Crisis Unit Details**. **Refer to the Follow-ups section for additional information.**

Other Notes

You can use this section to document General notes about the encounter, information related to Follow Up, and/or documentation of a Phone Call. This space is limited to 250 characters and is date and time stamped behind the scenes of the program. After entering a note here, it is viewable to the Crisis Operator. The Note History will show any special notes completed by the crisis operator for the mobile crisis unit.

Other Notes

Select the type of note

Select multiple option(s)

▼

Start typing your note here

Maximum 250 characters (250 remaining)

Clear

Save note

Note History

STARRED NOTES

Filter Notes

☆ Tammy Operator | Behavioral Health Emergency Services Program | 11:06 AM • 3/20/2024

BEFORE ARRIVAL

Call 5 minutes before arrival so he can leave area with dogs.

Dispositioning the Dispatch

To complete the dispatch select a final disposition from the available options. This is required to close the encounter.

Final Disposition of Consumer

Final Disposition of Consumer

- ☐ Not Yet Determined
- ☐ Resolved in the Community/at Scene
- ☐ Hospitalized
- ☐ Psychiatric
- ☐ Rehabilitation Center
- ☐ Inpatient Care Management **1**
- ☐ Outpatient Care Management **2**
- ☐ Incarcerated
- ☐ Shelter
- ☐ Other


Choosing **(1) Inpatient Care Management** or **(2) Outpatient Care Management** will open the OpenBeds Capacity Management and Referral system where you can make referrals to various service providers to meet the needs of the person in crisis. [Refer to the Refer to Treatment Provider\(s\) section for additional information.](#)

Transportation Needed


If transportation is needed, and you are required to coordinate transport based on your organization's business rules, toggle this option on and select the type needed from the drop-down menu.

Transportation Needed

Transport Method* ¹

Make a Selection | 

Transport Location* ²

Make a Selection | 

Special Accommodations ³



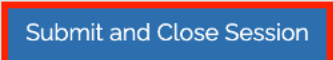

Transportation Method (1) – Select how the person in crisis will be transported (e.g., Non-emergency Transport, Law Enforcement, or Natural Support).

Transport Location (2) – Indicate where the person in crisis is being transported (e.g., Crisis Stabilization, the Emergency Department, or to Home.)

Special Accommodations (3) – Document any special travel accommodations the person in crisis needs.

Complete the Dispatch

Select **Submit and Close Session** to close the report and complete the dispatch. If a referral to an inpatient or outpatient service was selected, you will automatically be redirected to the OpenBeds Referral Management system to complete that referral. [Refer to Treatment Provider section for additional information.](#)

 [Export as PDF](#)   

Refer to Treatment Provider(s)

Selecting a final disposition of 'Inpatient Care Management' or 'Outpatient Care Management' on the Mobile Crisis Unit Response Report will automatically open the **Service Availability** page, connecting you to the OpenBeds referral management system. You can refer to both inpatient and outpatient service providers.

You are currently looking for: Patient Name: Colonial TreatmentProvider Age: N/A Gender Identity: N/A

Search Criteria 1 Additional Search Criteria 6 Search by Distance 7

Primary Service 1 2 Substance 3 Payments Accepted 4 Enter Organization 5

Search Clear

Service Availability

Check to make a referral to up to 3 facilities ☒

Submit Request	Organization	Primary Service	Inpatient/Residential Beds Available					Outpatient		Comments	Contact and Service Info	Last Updated	
			Adult		Adolescent		Total	Next Available Appointment	Walk-In Access				
			M	F	M	F							
→	211 (Direct Referrals)	Community-Based Services							02-20-2024		211 social service requests not related with treatment referrals. Please include patient zip code on all direct referrals....		10:08 02-15-2024

3 Facilities Selected (Select up to 3) Submit Request

You can select up to three providers at one time to refer to by checking the applicable box (outlined in red on the screenshot above) and selecting the green arrow on the left of the selected facilities name then clicking submit.

Search Criteria (1) – The search criteria opens 4 options (2 – 5 on screenshot) to streamline your search and allows you to search by multiple categories.

Primary Service (2) – Primary services can be selected from the dropdown or begin typing to narrow the options quicker. Multiple values can be selected. Clicking on the blue information icon gives you a description of the various services.

Substance (3) – Substances can be selected from the dropdown or begin typing for a quicker select option. Multiple values can be selected.

Payments Accepted (4) – Payment types can be selected from the dropdown or typed in for a quicker, targeted search. Multiple values can be selected.

Enter Organization (5) – The name of the target organization for the referral can be typed in to search this way.



Additional Search Criteria (6) – The Additional Search Criteria tab has options for searching by **Additional Services**, **Special Populations**, **Languages Served**, **Medical and Psychiatric Conditions**, and **Providers on Site**. Each of these has a drop-down list to choose from or you can type values in the box.

The screenshot shows the 'Additional Search Criteria' tab selected. It contains five input fields: 'Additional Services', 'Special Populations', 'Languages Served', 'Medical and Psychiatric Conditions', and 'Providers on Site'. At the bottom right, there are 'Search' and 'Clear' buttons.
































Search by Distance (7) – The Search by Distance tab has options to search by distance by miles and to search the distance from the service address or the person's zip code. You can also enter a city/town or county to search by area served.

The screenshot shows the 'Search by Distance' tab selected. It includes a 'Distance' dropdown menu set to 'Any distance', a 'Distance From' section with radio buttons for 'Service Address' (selected) and 'Patient Zip Code', and an 'Area Served' input field with the placeholder text 'Enter a town or county'. 'Search' and 'Clear' buttons are at the bottom.

This **Submit Request** column has icons to indicate how the organization will receive referrals.

	<ul style="list-style-type: none"> A green arrow indicates that referrals can be submitted electronically.
	<ul style="list-style-type: none"> A phone icon indicates that it is after the hours electronic referrals are accepted, so referrals are only accepted via telephone at this time.
PHONE ONLY	<ul style="list-style-type: none"> 'Phone Only' indicates that this organization only receives referrals via telephone.

Submit a Referral Request

Submit Request 1	Organization 2	Primary Service 3	Inpatient/Residential Beds Available 4					Outpatient		Comments 7	Contact and Service Info 8	Last Updated 9
			Adult		Adolescent		Total	Next Available Appointment 5	Walk-in Access 6			
			M	F	M	F						
	Deer Haven Treatment Center	Outpatient Counseling								Multiple appointments available this week; walk-ins accepted M-F; 9am - 5pm		14:43 02-15-2024
	DERec	Outpatient Counseling						12-07-2022		Telehealth Intake only Referrals must include a contact number.		14:54 05-09-2023
	Dutton Treatment Center	Outpatient Counseling										09:33 03-11-2024
PHONE ONLY	Emily receiving Org	Outpatient Counseling										16:42 10-25-2023

Submit Request (1) – This column has icons to indicate how the organization will receive referrals. If you are referring to more than one organization, clicking the green arrow will highlight the organization to be referred to and will not send it until you submit.

Organization (2) – This is the name of the organization that will receive your referral request.

Primary Service (3) – This column lists the primary service the organization provides. If you searched by a specific Primary Service, only providers with service types that match your selection will display.

Inpatient/Residential Beds Available (4) – This information reflects the number of available beds based on the provider's most recent update.

Outpatient Next Available Appointment (5) – This column provides the date of the provider's next available appointment based on their most recent update.

Outpatient Walk-In Access (6) – A green dot indicates that walk ins are accepted. A red dot indicates that walk ins are not accepted.

Comments (7) – Comments provided by the organization regarding their services are here. This information is verified/revised each time the organization updates their service availability details.

Contact and Service Info (8) – Clicking on the blue information icon brings up contact information and other details about the organization.

Last Update (9) – This column indicates the last time the organization updated their service information.

Clicking the green arrow for a singular request or the **Submit Referral** at the bottom of the page for multiple request submissions takes you to the 'Referral Request' form. Items with a red asterisk * are required. Demographic information entered as part of the dispatch and/or revised on the 'Mobile Crisis Unit Response Report' will auto-populate this form. Complete all applicable sections and click 'Submit' at the bottom of the page. Details on data captured on this form are below.

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Search Intake Form Dispatch Follow-ups Intake History Monitoring Analytics Service Availability Referral Request Status Tammy Operator

Referral Request

Contact Information

Treatment Organization:	Counseling Works!
Service:	Outpatient Counseling
Address:	9901 Linn Station Road, Suite 500, Louisville KY 40223
Phone Number:	(502) 509-6017
Email:	ggibson@bamboohealth.com
Id:	1333

Your preferred method to contact as per your profile is

E-Mail

Changing this will update your profile upon submit

Submit Request

First Name:	Last Name:
First Name	Last Name
Date Of Birth:	Phone Number:
MM-DD-YYYY	Phone Number
Gender Identity: *1	Age:
-- Select Gender --	0
Primary Language	Address line 1:
-- Select Language --	Address line 1
Address line 2:	City:
Address line 2	City
State:	Zip Code:
-- Select State --	Zip Code

☐ If above patient identifiers are included in Patient Information, please check to indicate that patient consent has been obtained. Attach Consent form, if required.

Attachment: 3 [Browse](#)

You may attach several documents

Please note Attachments will get auto deleted after 1 week.

Urgency of need: *4

Substances Treated: *5

Medical and Psychiatric Conditions: 6

Special Populations: 7

Payment: 8

Request (Maximum 200 characters): *9

Enter additional information here regarding the client's condition including co-occurring medical and/or psychiatric conditions. Maximum 200 characters

☐ Check if referral is voluntary

☐ Check if referral is non-voluntary

Notifications

Gender Identity (1)* - Select applicable option from the dropdown list if not auto-populated from the Intake Form.

Consent (2) - Check the box to indicate the person of concern consented to the referral. This box must be checked if referring to a Part 2 facility.

Attachment (3) – You can attach documents that are pertinent to the referral. They are deleted after 7 calendar days.

Urgency of Need (4)* – Select one option from the dropdown list.

Substances Treated (5)* – Select one or multiple items from drop down or begin typing in the box for quick select options.

Medical and Psychiatric Conditions (6) – Select one or multiple items from drop down or begin typing in the box for quick select options.

Special Populations (7) – Select one or multiple items from drop down or begin typing in the box for quick select options.

Payment (8) – Select one or multiple items from drop down or begin typing in the box for quick select options.

Request (9)* – Document any additional pertinent information to facilitate the referral in the narrative box. This space is limited to 200 characters. Then select the applicable radio button to indicate whether the referral is voluntary or involuntary.

(*Required field)

Monitor a Referral Request

After completing the referral, you are taken to the **Referral Request Status** page where you can see all referrals (active and archived) you and your organization have completed. You can track the status of referrals here.

The eye icon (1) means the referral request has been read by the receiving organization

The receiving organization’s decision regarding the referral is shown here (2) once that determination is made.

Whether the person in crisis showed for the referral is captured here (3). If the person is a no show that information is highlighted in red.

Manage Follow-Ups

The **Follow-ups** page captures all dispatches that have been indicated as in need of follow-up and for which follow-up was accepted and consented to. Click on the link under the ‘Name to ask for?’ column to see the full Intake Form.

Date of Follow-Up (1) - Select from the drop-down list or enter a custom date or range.

Assignee (2) - Select from the drop-down list or type the name of the staff member who is assigned to follow-up. Multiple names can be selected or entered. **Note:** Deactivated users will not appear in this drop-down menu

Created by (3) – Select from the drop-down list or type the name of the staff member who created the follow-ups you want to see. Multiple items can be selected or entered.

Open Follow-Ups (4) – The open follow-ups section lists follow-ups that need to be completed within the search parameters you entered.

Manage (5) – Manage allows you to quickly see the contact information for the follow-up, annotate the result of your follow-up attempt, and to complete the follow-up based on your organization's business rules. Be sure to save your update before closing.

Actions (6) - Once set, follow-ups are assigned by default to the staff member that created them. Depending upon your organization's business rules, you can assume follow-up responsibility by selecting your name from the drop-down list or be assigned someone's follow-up by a user with a Supervisor permission within your organization.

Export (7) – Export allows you to set date range and status filters and export the results in Excel.

View Completed Follow-ups (8) – This option displays all completed follow-ups within the date range you have selected. You can reopen a follow-up closed in error by clicking the 'Manage' button and unchecking 'Mark this Follow-up as completed.'

You can assign yourself to a follow-up that is currently assigned to someone else in your organization (9) by selecting your name from the drop-down list.

Note: Users with the Supervisor permission can reassign one or more follow-ups to one or more users within their organization. To reassign one or more follow-ups:

Follow-ups Export View Completed Follow-ups >

Date of Follow-up: Start Date - End Date 1 Assignee: John Weidkamp 4 Created By: Select multiple options Assign to: Gna Operator

Open Follow-ups

2 <input checked="" type="checkbox"/> Name to ask for? 2	3 Follow-up Due Date/Time 3	Contact Method 1	Contact Center 1	Follow-up Notes 1	Actions
<input checked="" type="checkbox"/> Garden View Garden State's Intake	2:39 PM - 4/7/2024 Overdue 30 days ago	Phone - (555) 555-5555 Voicemail: No	Behavioral Health Emergency Services Program Created By: John Weidkamp	follow-up notes	Manage John Weidkamp 4
<input checked="" type="checkbox"/> Dan View Dan Miller's Intake	2:57 PM - 4/7/2024 Overdue 30 days ago	Phone - (333) 333-3333 Voicemail: No	Behavioral Health Emergency Services Program Created By: John Weidkamp	left message with Dan	Manage John Weidkamp 4
<input checked="" type="checkbox"/> dan View Garden State's Intake	11:35 AM - 4/27/2024	Phone - (555) 555-5555 Voicemail: No	Behavioral Health Emergency Services Program Created By: John Weidkamp	call on 4/27 in AM	Manage John Weidkamp 4
<input checked="" type="checkbox"/> Tess View Tess McTesterson's Intake	2:09 PM - 5/15/2024 Overdue 30 days ago	Phone - (444) 444-4444 Voicemail: Yes	Behavioral Health Emergency Services Program Created By: John Weidkamp	Consented to follow-up call in 48 Check on community based counseling and how coping with loss of trigger dog	Manage John Weidkamp 4

Filter by 'Assignee' (1).

Check the box beside the 'Name to ask for?' column (2) to select all or by checking the box beside the name of the individual who consented to the follow-up (3) to select only one. This displays an 'Assign to' filter (4).

Select the staff member the follow-ups will be reassigned to. This generates a pop-up alert to confirm the reassignment. Click 'Complete' to finalize the reassignment.

Contact Method 1 Contact Center 1

Are you sure you want to bulk assign 4 follow-ups?

Cancel Complete

Phone - (555) 555-5555
Voicemail: No

Behavioral Health Emergency Services Program
Created By: John Weidkamp

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Version History

Version	Author	Date	Changes
1.0	Tammy Prickett	4/1/24	First Release
2.0	Gina Gibson	8/5/24	Added additional usage options and incorporated applicable product enhancements through 8/7/24 scheduled release