Bamboo Health

OpenBeds® Crisis Management System

Crisis Administrator User Guide

Revised 11/26/2024

Introduction

This guide details the responsibilities and distinct privileges for OpenBeds users with the role of Crisis Administrator as outlined below.

1. Manage users with a Crisis Operator and/or Mobile Crisis Unit (MCU) Team Member role.
2. Define and assign mobile crisis response service areas.
3. Configure select sections on the Crisis Management Module.
4. Train new staff on OpenBeds usage.

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

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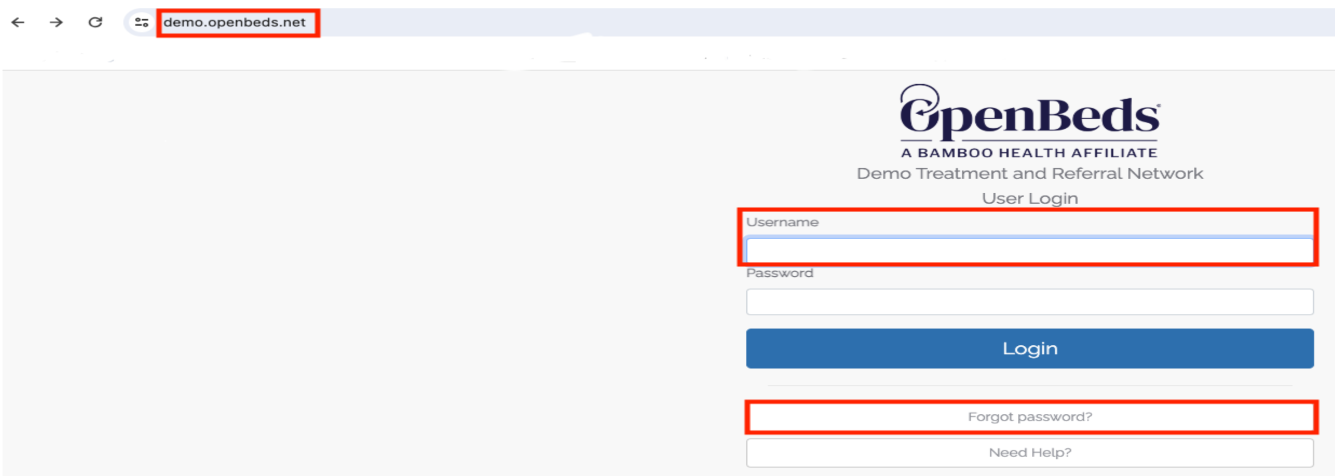
Logging In

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.



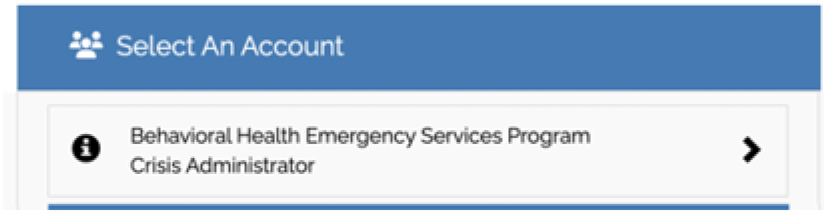
For subsequent log ins:

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 'Crisis Administrator' role.

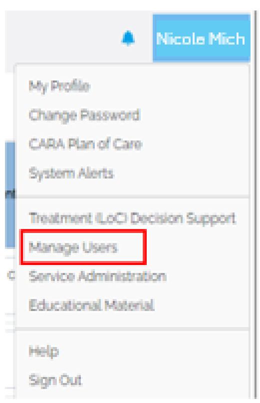


Note: Refer to the Crisis Operator User Guide and/or the Mobile Crisis Unit Team Member User Guide for details on operationalizing the responsibilities and distinct privileges of these roles.

User Management

Create New User Account

To create a new user, log into OpenBeds using your credentials, click the drop-down icon beside your name at the top right of the page, and select 'Manage Users'. **Note**: You can only create new users for the organization(s) your Administrator role is attached to.



Select '+Add New User' (1) to open the 'Add New User' drawer (2) displaying the information needed to create the new user. Required fields are denoted by a *. **Note**: All data fields will be empty by default.

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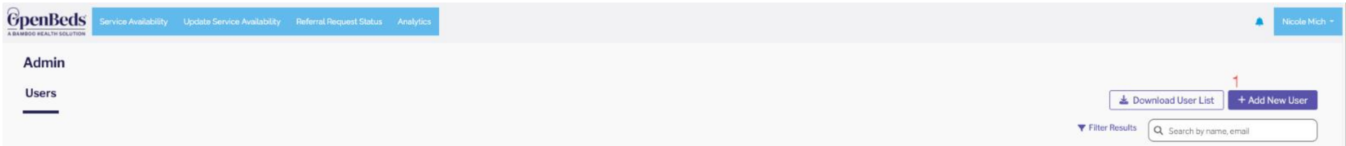
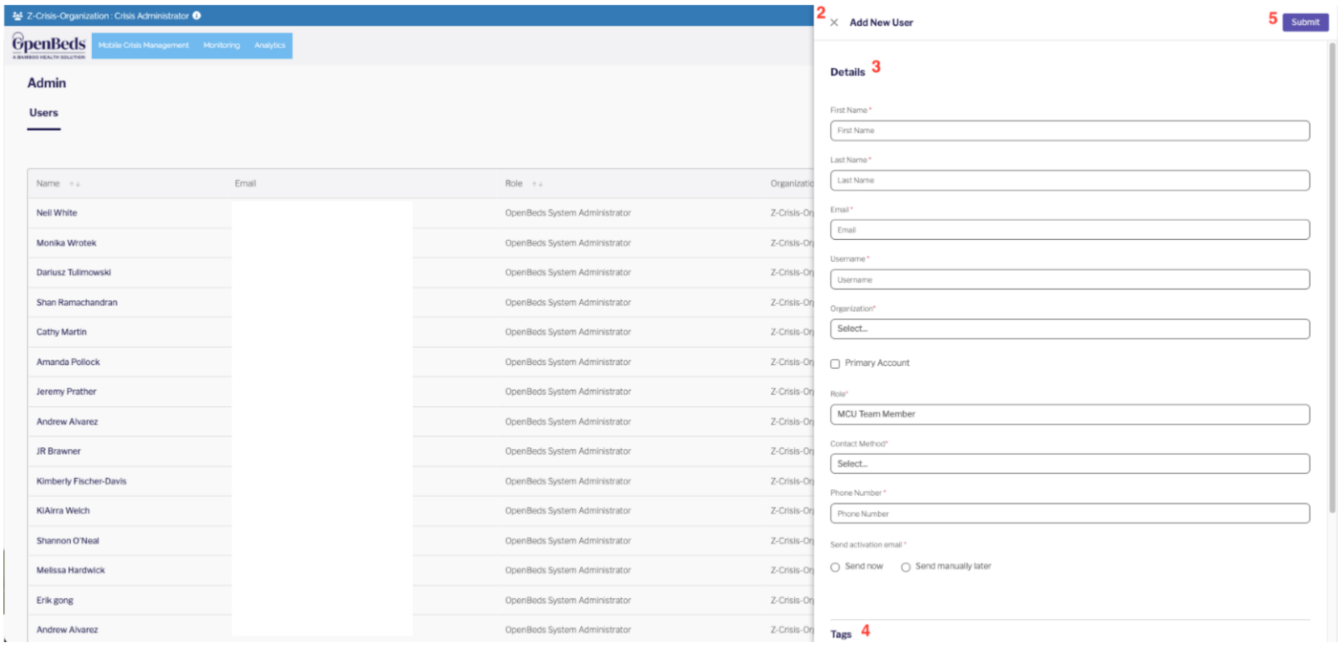
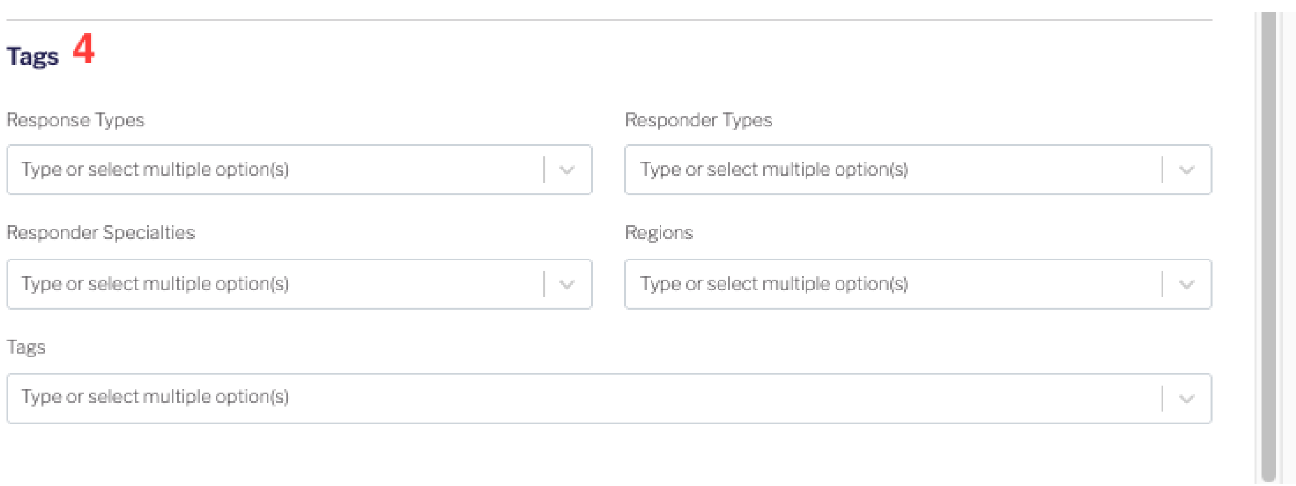


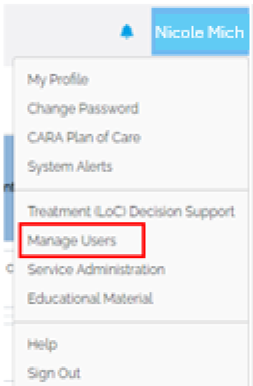


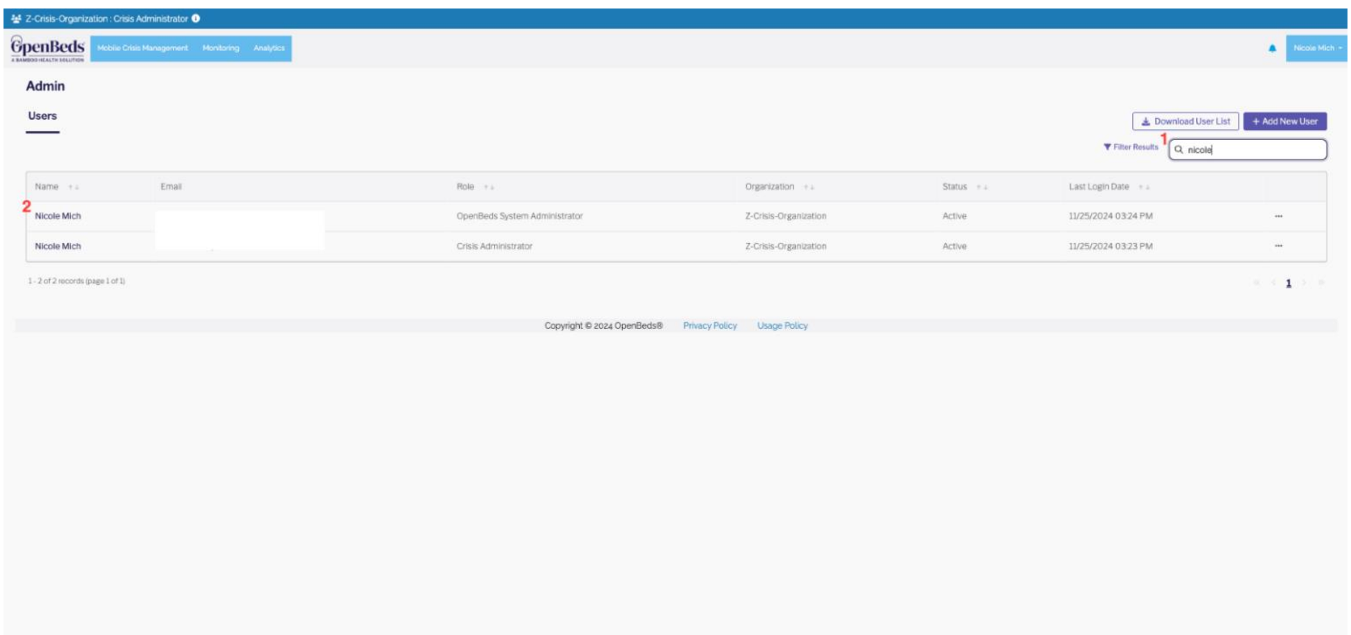


Enter the new user's details (3), add Tags (4) to mobile crisis responders if applicable, and click 'Save' (5) to add the new user to your organization. Refer to the Mobile Crisis Tags section for additional information.

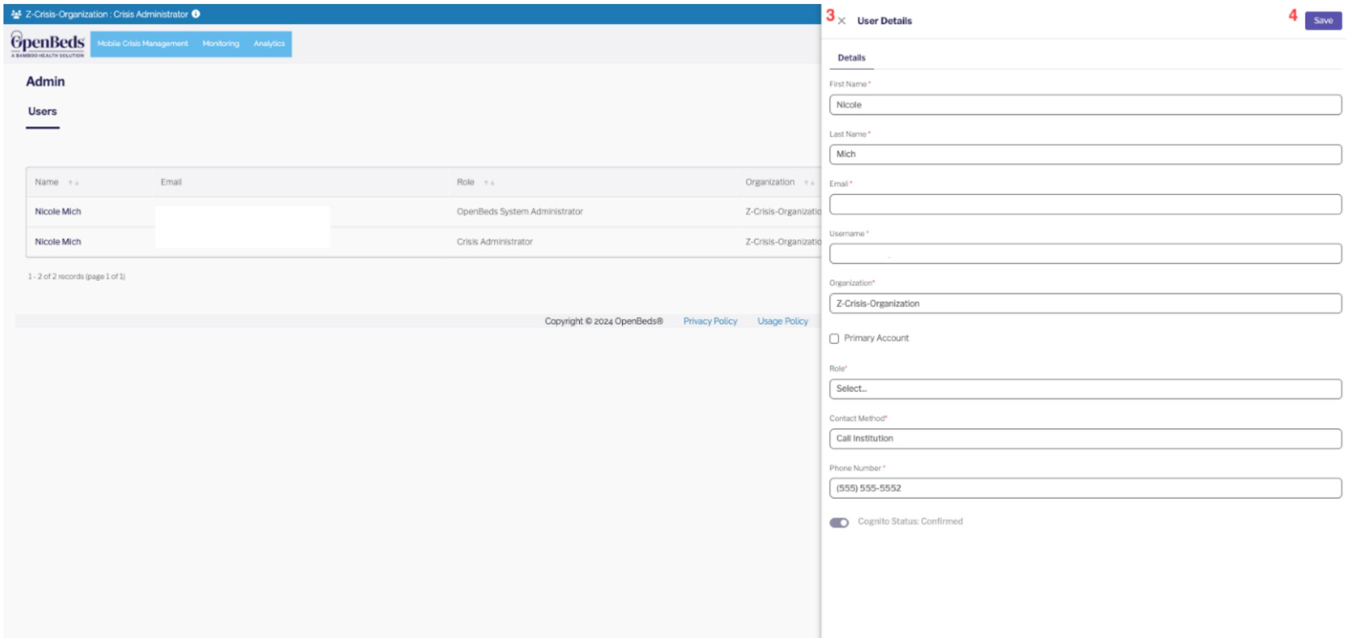
Edit an Existing User

To edit an existing user's profile, log into OpenBeds using your credentials, click the drop-down icon beside your name at the top of the page, and select 'Manage Users'.





Enter the user's name or email address in the search bar (1) to narrow the user list. Click on the name of the applicable user or administrator (2).



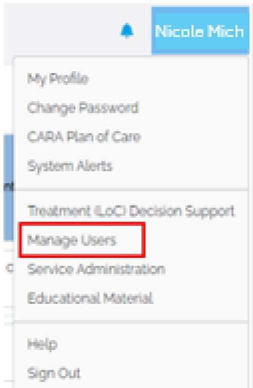
The 'User Details' drawer (3) opens for editing. You can change any data field displayed at any time, even if the user's account has been deactivated. Click 'Save' (4) to capture any changes made to the user's profile.

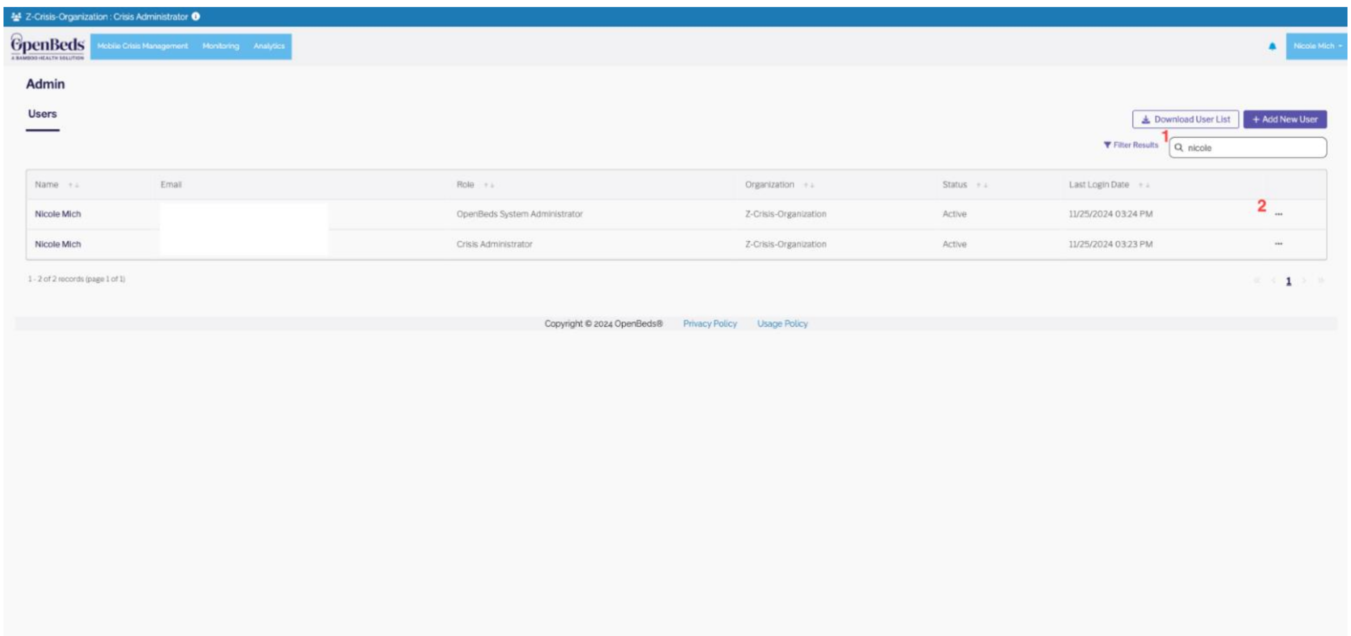
Pending Users

Users with the status of 'Pending' on the 'Manage User' page, have not signed into their newly created OpenBeds account. Direct these users to log in to change their status to 'Active'.

Deactivate or Reactive a User

To deactivate or reactivate a user, log into OpenBeds using your credentials, click the drop-down icon beside your name at the top of the page, and select 'Manage Users'.

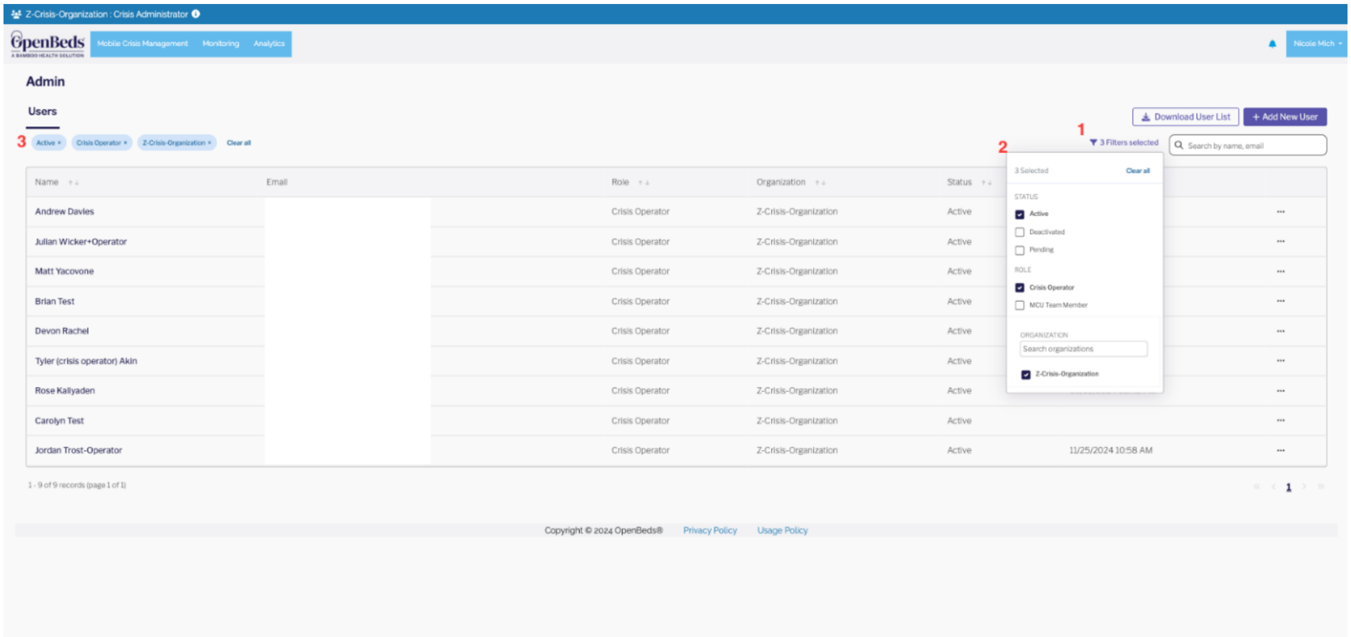




Enter the user’s name or email address in the search bar (1) to display the appropriate user in the ‘Users’ list. Click on the ‘…’ (2) to the right of the user’s name and select ‘Deactivate’ or ‘Restore Account’ from the action menu as applicable. **Note**: If the user’s account is ‘Active’ or ‘Pending’ you will see the option to deactivate the account. If the user’s account is already deactivated, you will see the option to restore the account.

Filter the User List

To apply filters to the user list,



Click the filter icon (1) to open the filter dropdown menu (2) and apply the desired filters for user status, user role, and/or organization name.

As filters are selected, that criteria will display as a pill (3) to indicate which filters are in place for your search. To remove filter criteria, you can either uncheck the box beside the filter in the dropdown menu or click the 'x' in the filter pill.

Your user list will update based on the filter criteria you applied.

Download the User List

To download your organization(s) user list, click 'Download User List' to export the populated list.

If a filter is in place, the export will only populate information that matches the filter criteria. If no filter is in place, the total user list will be available in the export.

You will be able to see the following information in your exported download as applicable:

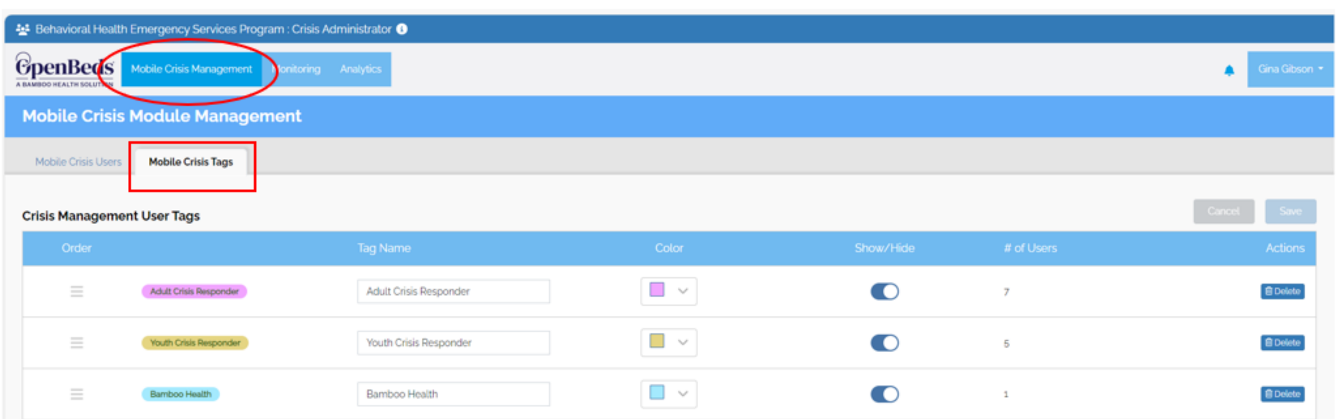
- All available information on the user table (name, email, role, organization, status, last login)
- Additional fields such as created date, activated date, last login, deactivation date, and deactivation method

Note: Any accounts deactivated prior to the 90-day automated security deactivation process implemented on January 10, 2024 will not have an associated deactivation method.

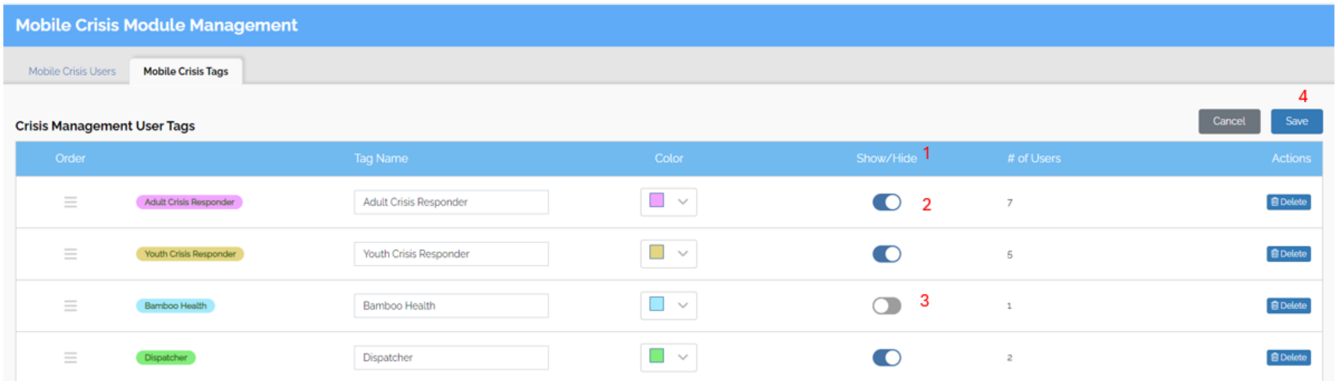
Mobile Crisis Tags

You can define and assign 'tags' to MCU team members' profiles to help facilitate identification of the most appropriate responder for a mobile crisis dispatch. Tags are defined and managed at the organization level.

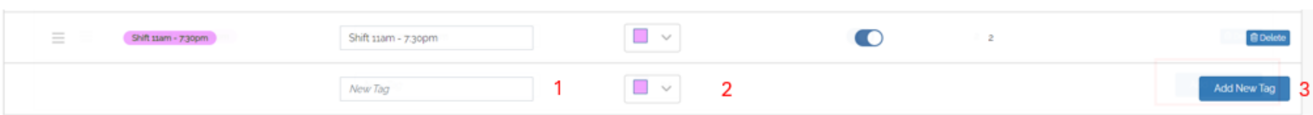
To add, edit, and/or assign a tag, navigate to the **Mobile Crisis Management** page, and select the 'Mobile Crisis Tags' tab.



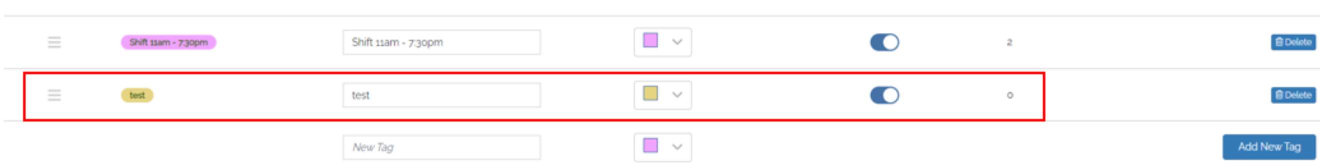
Here you can elect to show or hide existing tags, delete existing tags, or create new tags. To show an existing tag or hide an existing tag, toggle the button in the 'Show/Hide' column (1) next to the desired tag. The button will be blue if the tag is visible (2) and will be gray if the tag is hidden (3). Click the 'Save' button (4) to confirm your changes.



To add a new tag, scroll to the bottom of your tag list, enter the name of the new tag (1), select the tag color (2), and click the 'Add New Tag' button (3) to show the tag on the list. Be sure to click the 'Save' button at the top of the page to confirm tag creation.



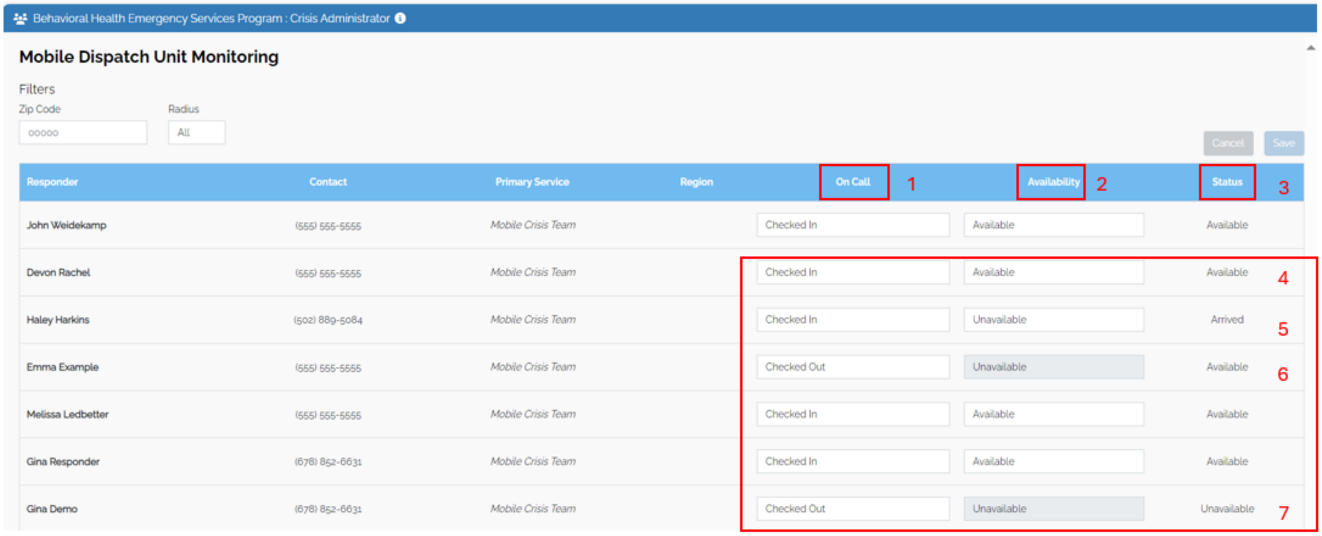
Once created, the new tag appears at the bottom of your tags list in a status of 'show' with no users assigned.



Refer to the User Management section for additional information.

Monitoring

You can view and change the status of a mobile crisis responder via the **Monitoring** page.



On Call (1) – This column displays whether the MCU team member is checked in or out on the **Mobile Crisis Unit Details** page. This information can be manually updated by the mobile responder or system updated depending upon that's responder's dispatch status.

Availability (2) – This column displays whether the MCU team member is showing as available or unavailable on the **Mobile Crisis Unit Details** page. This information can be manually updated by the mobile responder or system updated depending upon that's responder's dispatch status.

Status (3) – This column displays whether a mobile responder is available to be dispatched or that responder's status if actively responding to a dispatch. This information is system generated based on the 'last known' status.

Status Combinations:

Checked In + Available + Available (4) generally means the MCU team member is ready and waiting to be dispatched

Checked In + Unavailable + Arrived (5) {or any dispatch status} generally means the MCU team member is actively responding to a dispatch. The current level of engagement is indicated by the status.

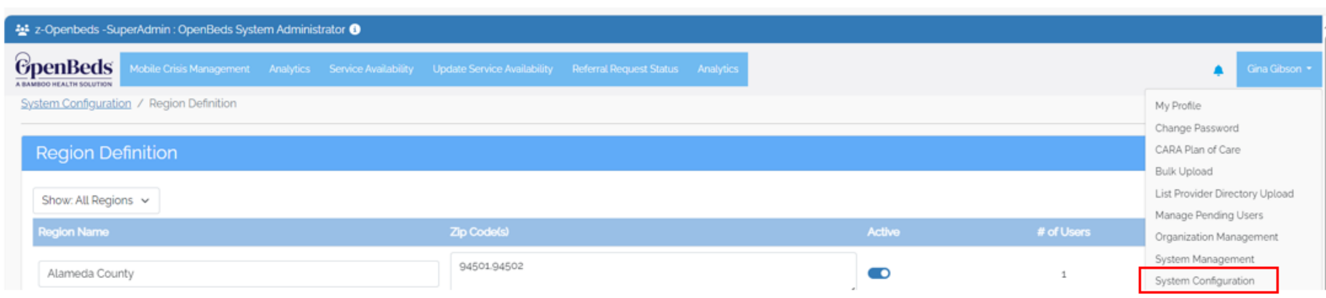
Checked Out+ Unavailable + Available (6) generally means the MCU team member changed their status but didn't sign out.

Checked Out + Unavailable + Unavailable (7) generally means the MCU team member changed their status and signed out.

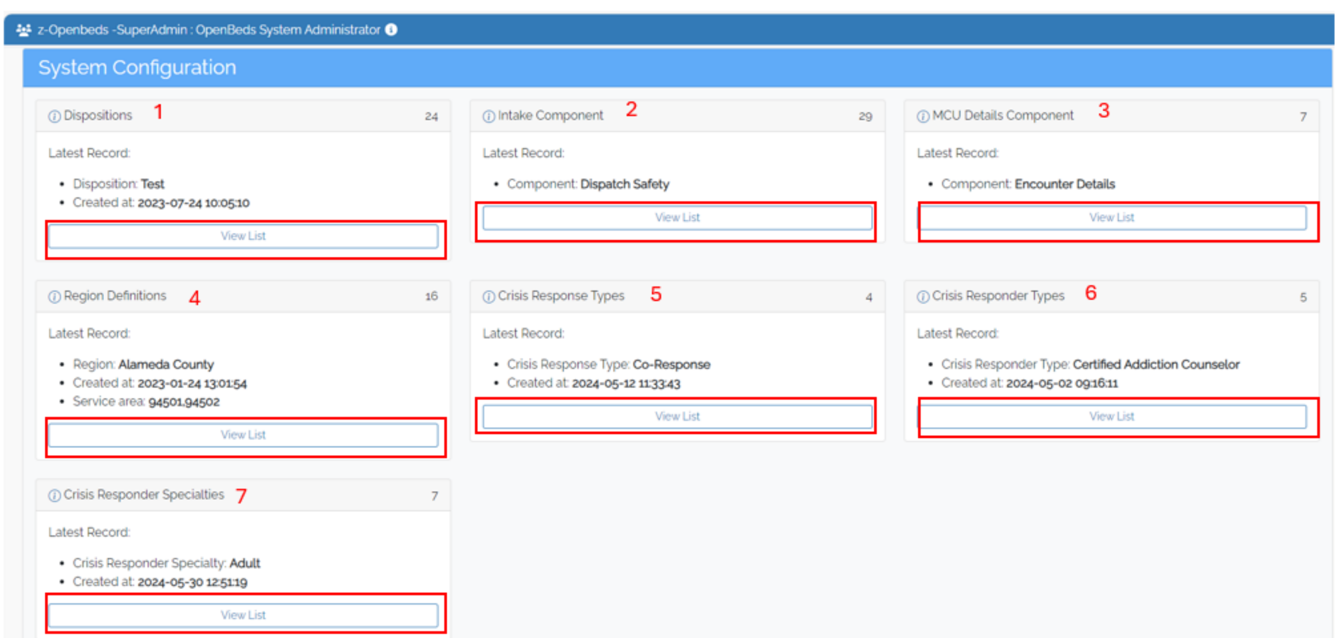
For State Administrators Only

System Configuration

State Administrators can configure select sections of the Crisis Management Module as outlined below. To begin, log into your System Administrator account and select 'System Configuration' from the menu options below your username.



Click 'View List' for the desired section on the 'Systems Configuration' page. All elections and changes are applicable statewide.



Dispositions (1) – Allows you to create, update, and delete final dispositions that users with Crisis operator and MCU team member roles can choose from. Refer to the Dispositions section below for additional information.

Intake Component (2) – Allows you to determine whether to show or hide select sections of the Intake Form.

MCU Details Component (3) – Allows you to determine whether to show or hide select sections of the Mobile Crisis Unit Response Report.

Region Definitions (4) – Allows you to create, update, and delete mobile crisis response services areas. Refer to the Mobile Crisis Response Services Area section below for additional information.

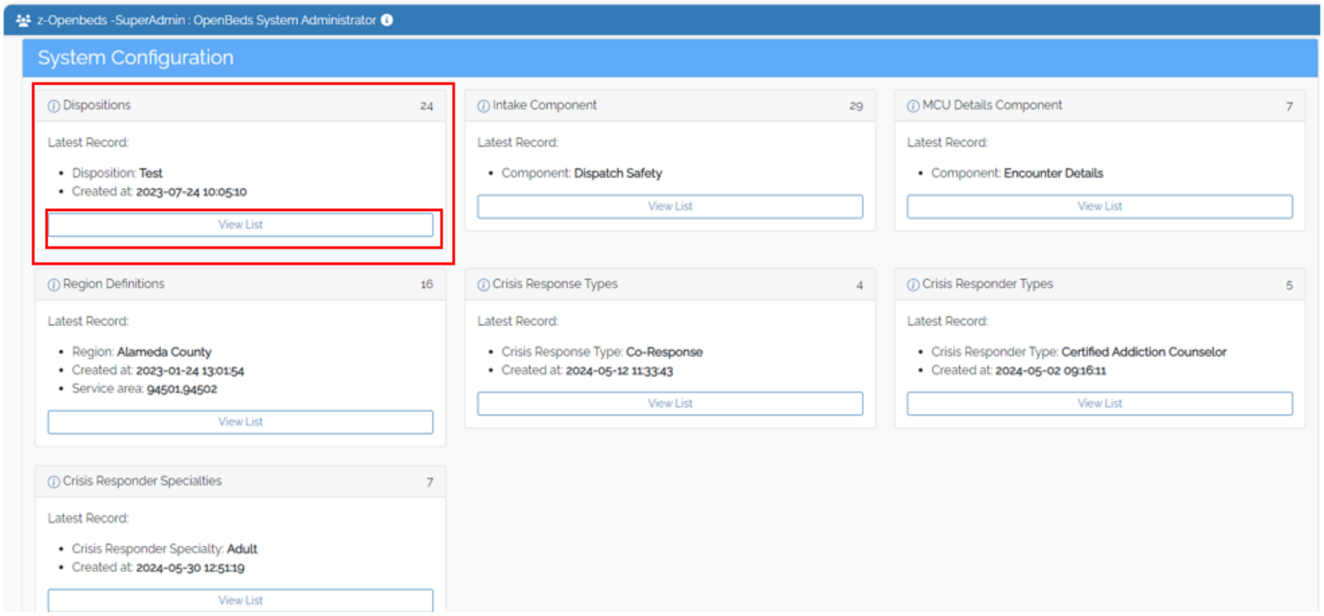
Crisis Response Types (5) – Allows you to create, update, and delete the way a MCU team member responds to the dispatch (e.g., Co-response, In-Person, Telehealth, etc.).

Crisis Responder Types (6) – Allows you to create, update, and delete the role MCU team members fulfil in the dispatch (e.g., Behavioral Analyst, Clinician, Peer, etc.).

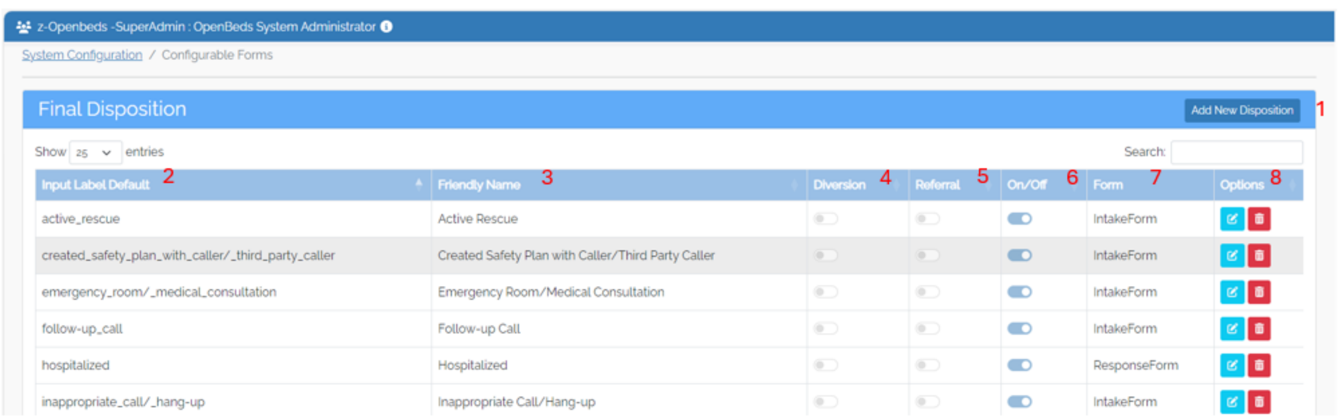
Crisis Responder Specialties (7) – Allows you to create, update, and delete the population the MCU team member has specialized training and/or experience serving (e.g., Geriatric, IDD, Youth, etc.).

Dispositions

To define final disposition options that the Crisis operator and/or MCU team member can choose from, click 'View List' for the 'Dispositions' section.



The 'Final Disposition' page opens, allowing you to define, show/hide, edit, delete, and/or create new dispositions.



Add New Disposition (1) – Clicking this button allows you to create a new disposition and its associated attributes. Refer to the Create a New Disposition section below for additional information.

Input Label Default (2) – This is system generated based on 'Disposition Name'.

Friendly Name (3) – This is the display name based on the 'Disposition Name' created and/or edited.

Diversion (4) – Select whether or not this disposition counts as a diversion from a higher level of care based on your organization's business rules.

Referral (5) – Select whether this disposition counts as a referral for follow-on care. **Note:** If the OpenBeds Capacity Management and Referral System is active for your organization, enabling this for the Response Form allows MCU team members to be auto directed to OpenBeds when the associated final disposition is selected.

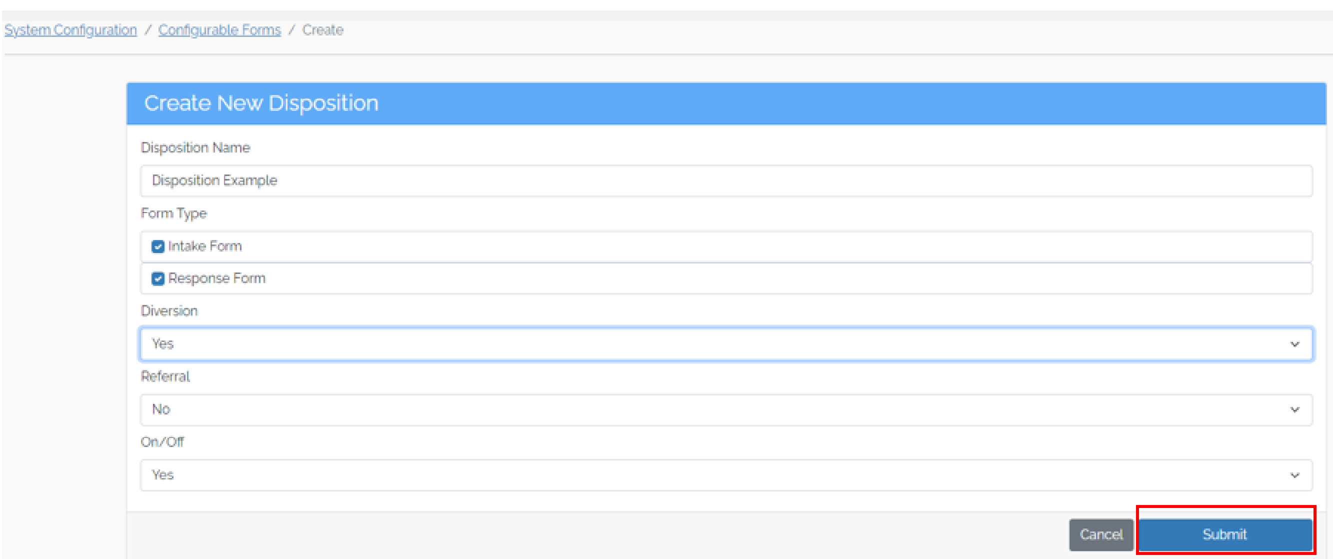
On/Off (6) – This allows you to show/hide the corresponding final disposition.

Form (7) – Determine whether to show this final disposition on the Intake Form and/or the Mobile Crisis Unit Response Report.

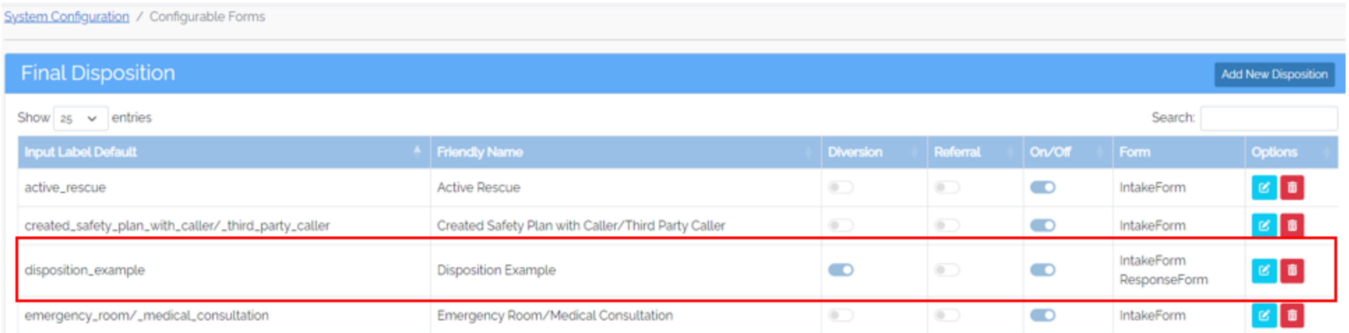
Options (8) – You can edit and/or delete a disposition by selecting the applicable icon from this column. Refer to the Edit a Disposition and Delete a Disposition sections below for additional information.

Create a New Disposition

To create a new disposition, click the 'Add New Disposition' button to open the 'Crate New Disposition' form. Complete the applicable information and click 'Submit' to save.

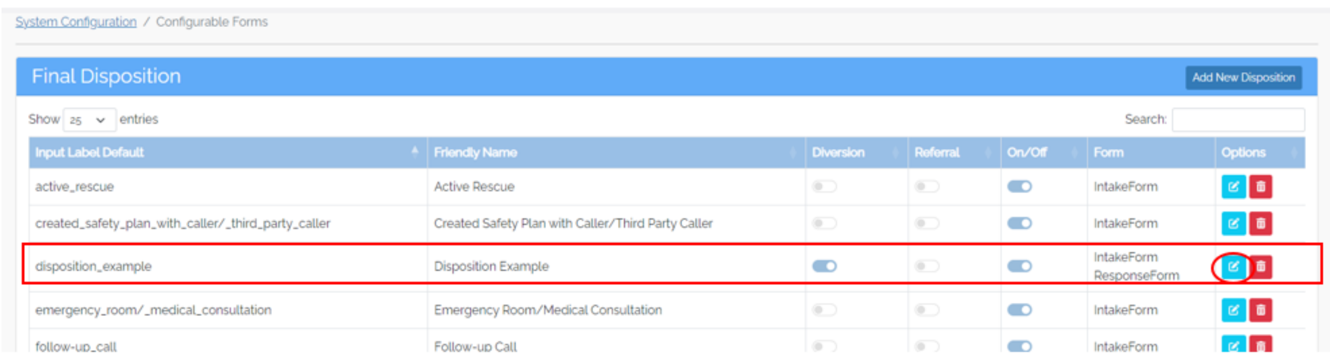


The new disposition is added to the existing list in alphabetical order.

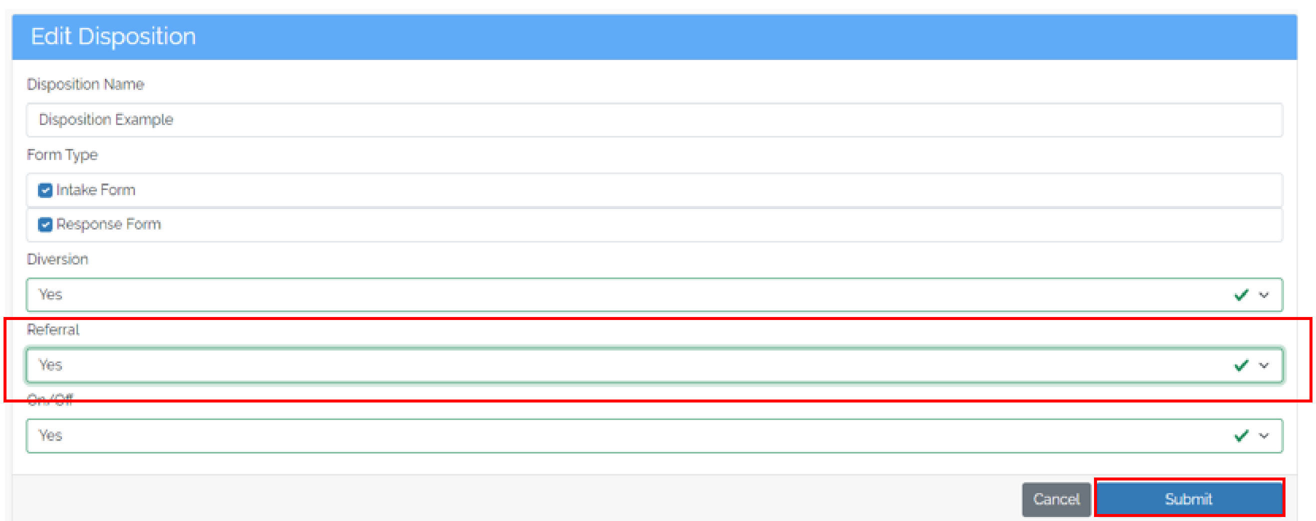


Edit a Disposition

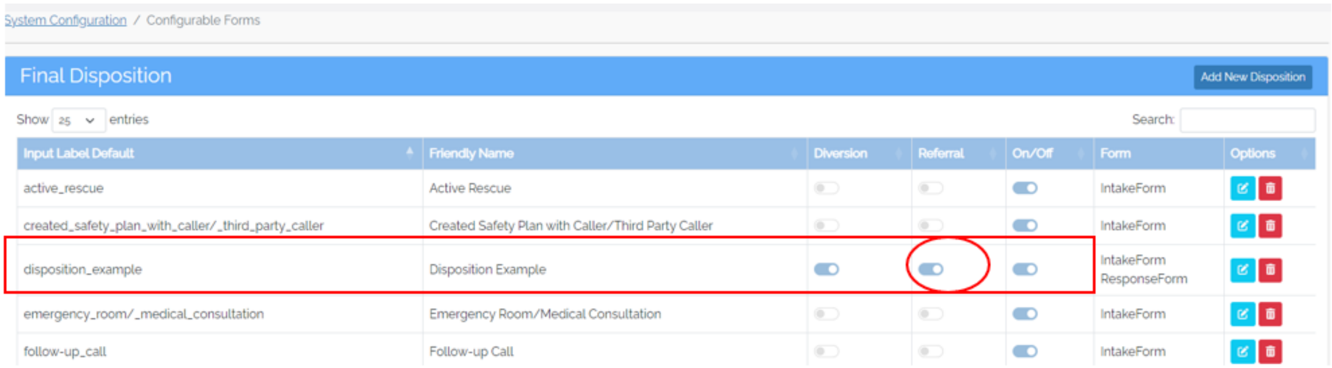
To edit an existing disposition, select the pencil icon in the 'Options' column.



This opens the 'Edit Disposition' form. Make the desired change and click 'Submit' to save. **Note:** The data field changed will be shadowed by a green border.

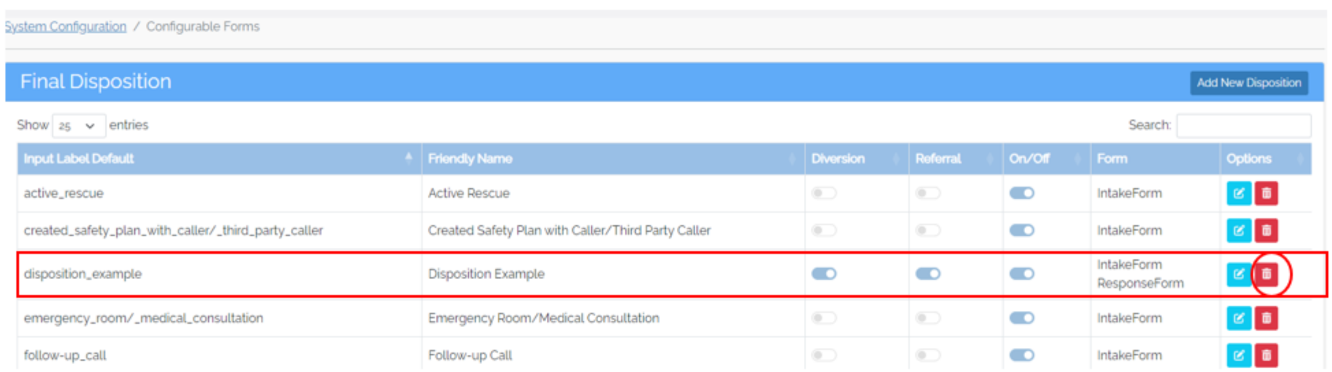


This change will be immediately reflected on the 'Final Disposition' list page.

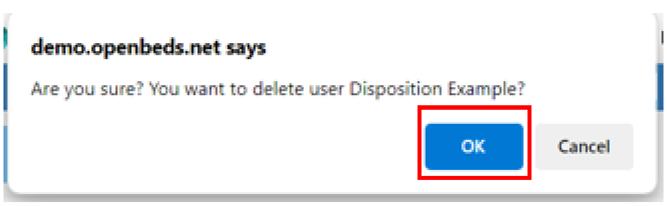


Delete a Disposition

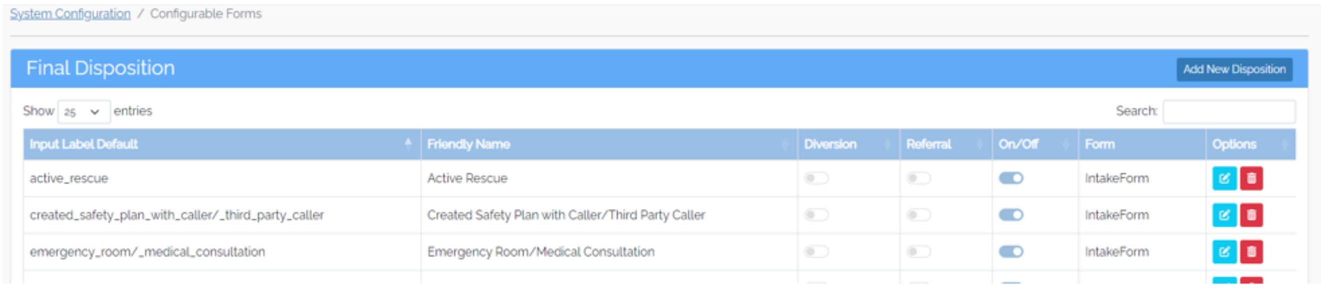
To delete a disposition, select the trash can icon in the 'Options' column.



You'll see a pop-up box asking you to confirm your intent to delete the applicable disposition. Select 'Ok' to complete the deletion.

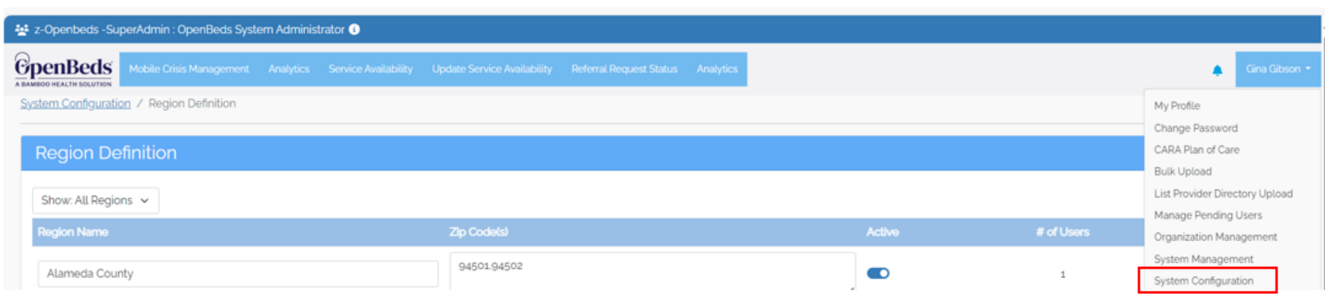


A quick pop-up message that the disposition was successfully updated appears in green in the upper right-hand corner of the page and the disposition is no longer visible in the list on the 'Final Disposition' page.

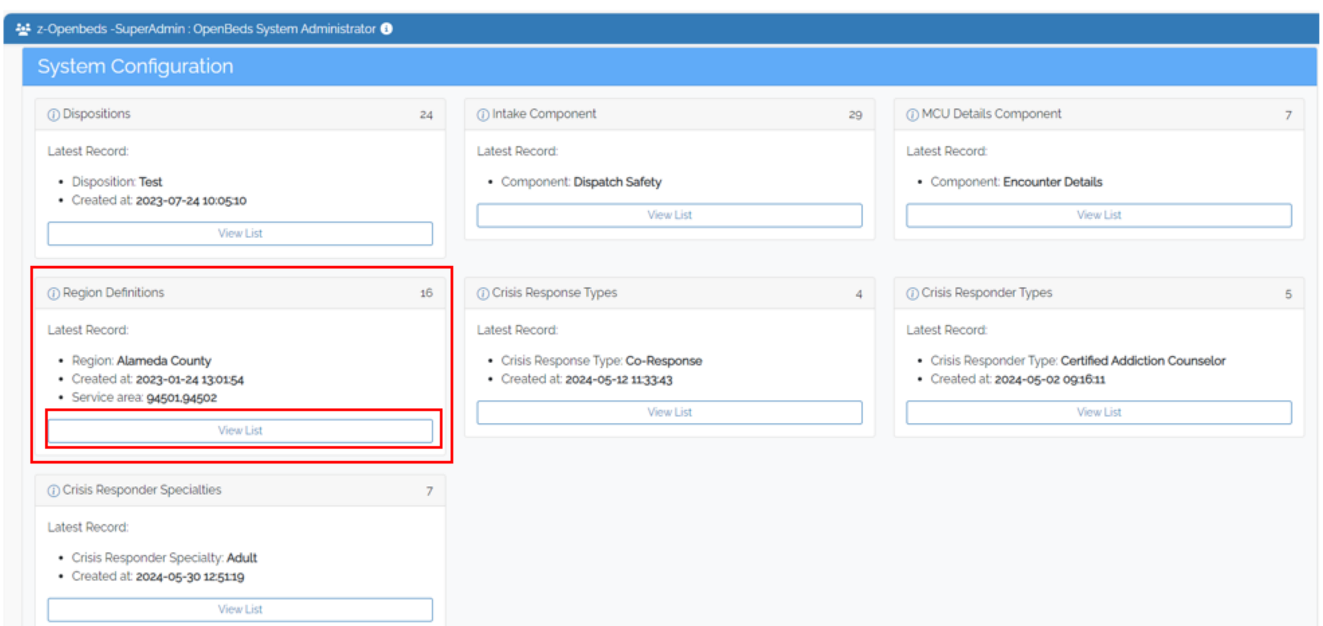


Mobile Crisis Response Service Areas

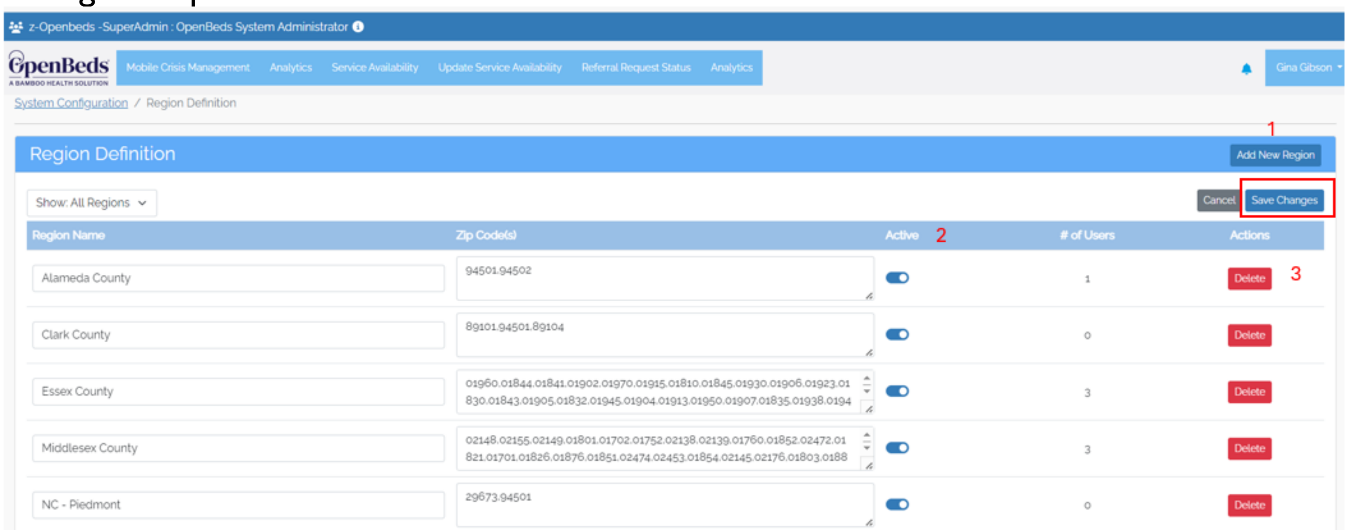
As a State Administrator, you can define and assign mobile crisis response service areas by logging into your System Administrator account and selecting 'System Configuration' from the menu options below your username.



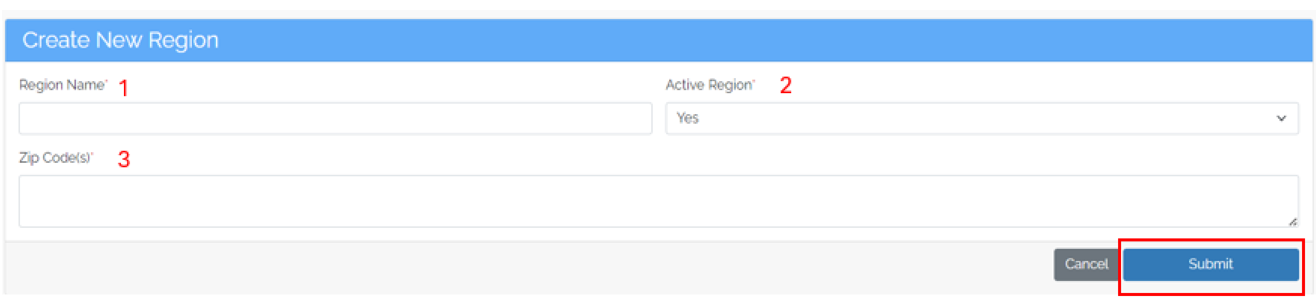
Click 'View List' for the 'Region Definitions' section.



The ‘Region Definition’ page displays, allowing you to add a new service area (1), inactivate an existing service area (2) or delete (3) an existing service area. Click ‘Save Changes’ to preserve edits.



Clicking the button to ‘Add New Region’, opens the ‘Create New Region’ form where you designate the name (1), status (2), and associated zip codes (3) for the service area. Click ‘Submit’ and the new service area appears on the ‘Region Definition’ page in alphabetical order.



Once established, Crisis Administrators can add this information to the MCU team members’ profile for ready reference. This information also surfaces on the Intake Form in the upper right-hand corner of the ‘Location’ section to assist Crisis operators with identifying the appropriate responders to dispatch.

Version History

Version	Author	Date	Changes
1.0	Gina Gibson	8/13/24	Revised release
2.0	Gina Gibson/Nicole Mich	11/26/24	Incorporated the new user management functionality