OpenBeds® Crisis Management System

Receiving Provider User Guide – Consolidated Referral View

Created 10/30/24

Introduction

This user guide details the responsibilities and distinct privileges of the Receiving Provider user role using the consolidated referral view.

Key features of the consolidated referral view include:

1. *Consolidated Interface*: Patient information, referral forms, and messaging pages are now combined into a single, easy-to-use interface, making it simpler to review and manage referrals all; in one place.

2. *Clearer Communication*: The updated messaging designs show who is messaging and from which organization, making collaboration smoother.

3. *Organized Layout*: Key sections like referral forms and attachments are separated for easier scanning, helping you quickly find and review the information needed.

4. *Improved Status Workflows*: Streamlined status categories align with your workflows, removing any guesswork about which status to use and when. This ensures greater transparency and actionable insights for referrals.

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:

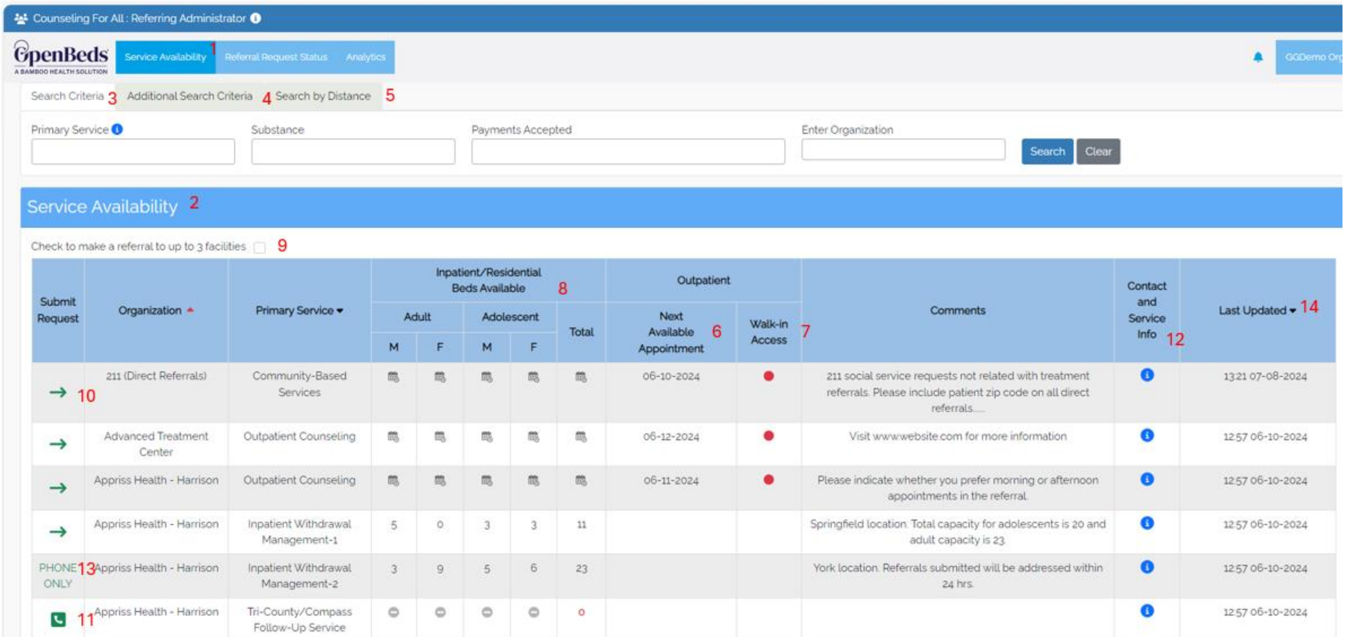
1. From your web browser, navigate to the OpenBeds URL: https://<<your state's abbreviation>> .openbeds.net/ and select "Forgot Password"
2. Enter your work email in the 'Username' box and click 'Request Password'
3. Enter the verification code sent to your email in the 'Verification Code' box
4. Create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

Request a Referral

Search for Receiving Service



After logging in, to search for the appropriate service and the organization(s) providing it:

1. Click on the **Service Availability** page (1) which displays all available organizations in alphabetical order, along with additional service and availability details via the Service Availability dashboard (2). **Note:** You are automatically defaulted to the **Update Service Availability** page and will need to navigate to the **Service Availability** page. See the Update Service Availability section below for additional information on updating available services.
2. Narrow results by filtering according to client attributes using the ‘Search Criteria’ (3), ‘Additional Search Criteria’ (4) and/or ‘Search by Distance’ (5) tabs.
3. Outpatient services are defined by the ‘Next Available Appointment’ (6) date and/or whether or not the facility has ‘Walk-in Access’. (7)
4. Inpatient/Residential services are defined by the number of available beds by gender and age group. (8)
5. Select the most appropriate organization and primary service from the filtered list according to the icon in the ‘Submit Request’ column as outlined

below. **Note**: you can select up to 3 facilities to refer to simultaneously by checking the box immediately below the dashboard header. (9)

   a. **Green Arrow icon** (10): This organization accepts electronic referrals via OpenBeds for this primary service type. Clicking this option takes you to the 'Referral Request Form' for completion to submit the referral request.
   b. **Green Phone Icon** (11): This organization normally accepts electronic referrals through OpenBeds, but your request is after their acceptance hours, so you'll need to call them instead. Clicking this option displays the receiving service's contact and other information page, including the phone number to call. **Note**, this is the same information that is displayed when you click the blue information icon in the 'Contact and Service Info' column (12) of the dashboard.
   c. **Green Phone Only text** (13): This organization only accepts referrals by phone. Clicking this option displays the receiving service's contact and additional information page, including the phone number to call.

6. The 'Last Updated' column (14) alerts you to how current the information you are viewing is, to help inform your selection.

Submit a Referral Request

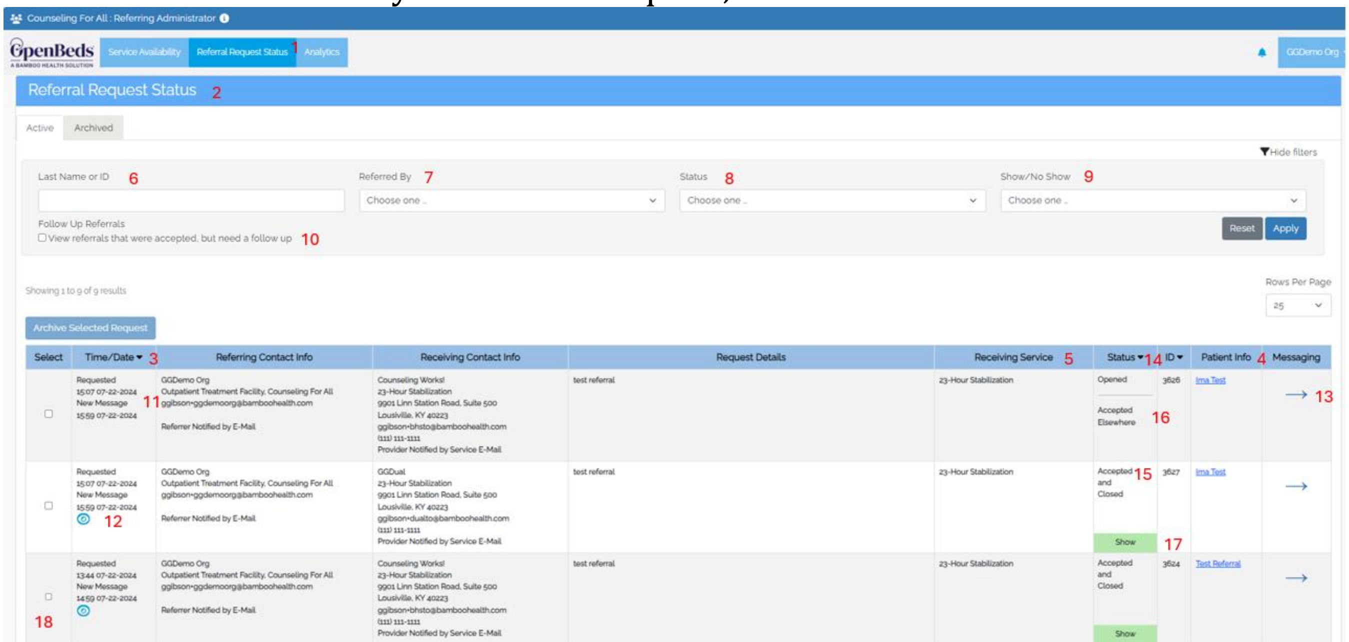
To submit a referral request:

1. Check the box to make a referral to up to 3 facilities if desired.
2. Click on the green arrow icon(s) for the organization(s)/primary service you want to submit the referral request to. This opens the 'Referral Request' form.
3. Complete the required information denoted by a red asterix (*) and any other relevant information to facilitate the request. Be sure to obtain and document that you received consent before sharing any of the individual's protected health information (PHI). Attach a copy of the consent to share PHI if required by the organization receiving the referral request.
4. Select whether the referral is voluntary or non-voluntary.
5. Click the 'Submit' button to make the referral. The Receiving organization will be notified via email and on their 'Referral Request Status' dashboard of this request.
6. **Note**: You are able to both submit referral requests to other organizations/services and to receive referral requests from other organizations/services.

Monitor and Manage a Referral Request

Monitor a Referral Request

To monitor the status of your referral request,



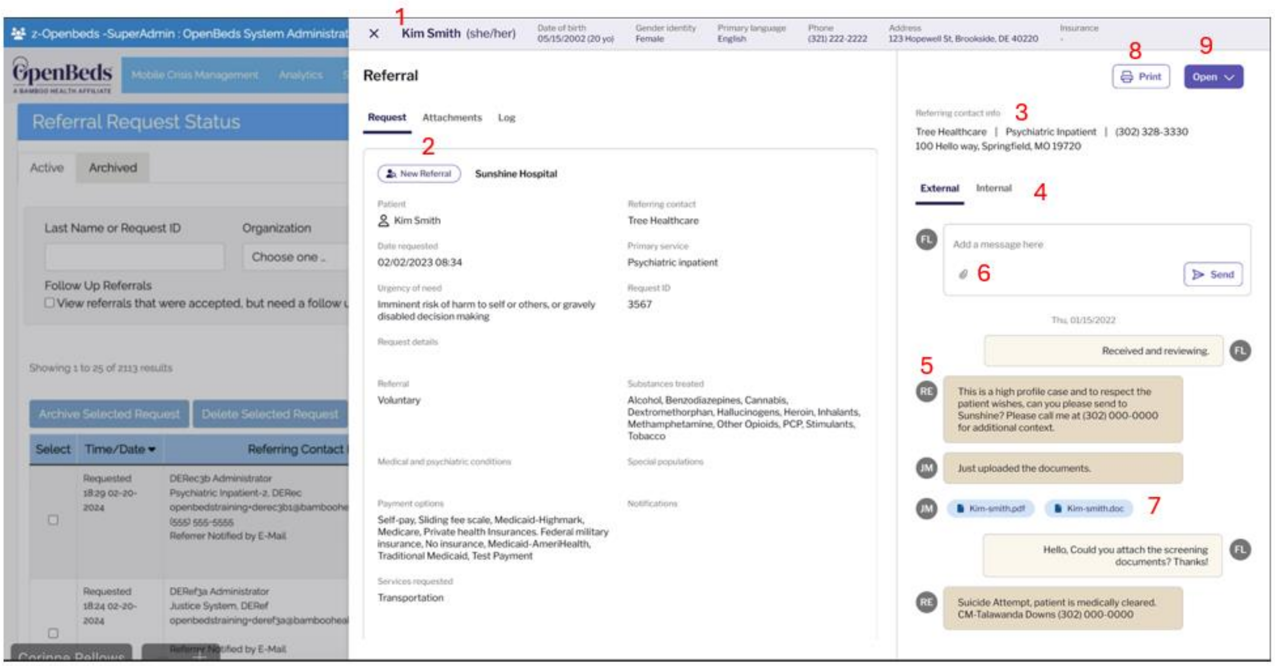
1. Navigate to the **Referral Request Status** (1) page which displays the Referral Request Status dashboard (2). **Note**: Referrals populate in chronological order by request day/time (3) with the most recent on top,
2. Select the referral you want to monitor/manage.
   a. If you are monitoring multiple individuals, use the ‘Patient Info’ column (4) as a reference.
   b. If you are monitoring multiple services, also use the ‘Receiving Service’ column (5) for reference.
   c. You can also filter by the individual’s last name or referral ID number (6), organization referred by (7), referral status (8), closed loop disposition (9), or referrals that have been accepted but need a disposition follow-up. (10).
3. Unread requests are in bold (11). If the referral has been viewed by the receiving organization, the request is no longer in bold, and you will see the eye icon in the Time/Date column (12)
4. Click the arrow icon in the ‘Messaging’ column (13) to view the referral. See Manage a Referral Request for additional information.

5. You can track the receiving organization's response to your referral in the 'Status' column (14).
    a. If you send a referral to more than one receiving organization and that referral is accepted by one of those organizations (15), the other organization(s) will be notified that the referral was 'Accepted Elsewhere' (16).
    b. When the individual shows or fails to show for the referral, the receiving organization updates the referral status to close the referral loop (17). **Note**: Part 2 facilities must receive and document the individual's consent before show/no show data can be shared.
    c. Once a referral is closed, users can archive these by selecting the radio button beside the applicable referral in the 'Select' column (18).

Note: You can only see referrals for the service your role is attached to.

Manage a Referral Request

When you click the arrow icon in the 'Messaging' column, a 'drawer' will slide open from the right-side of the screen.



Basic demographic information (1): A ribbon across the top of the drawer displays the name, date of birth, gender identity, and other demographic information for the person of concern. This information comes from the original referral request submission.

Request (2): You are auto defaulted to the Request tab which displays the referral form completed and submitted by the referring organization. See the other tabs sections for additional information on the Attachments and Log tabs.

Referring Contact Information (3): Information about the referring organization including the organization's name, type of service making the referral, facility phone number, and facility location.

Messaging (4): You are auto-defaulted to the 'External' tab where you can communicate bi-directionally with users outside of your organization. Use the 'Internal' tab to send messages to user within your organization. **Note:** External users cannot see 'Internal' messages.

1. Hover over the initials icon (5) to see the sender's full name, their organization, and the date/time the message was sent.
2. You will still receive an email notifying you when a message has been sent with a link to log into OpenBeds for details in the event you are not logged into OpenBeds or actively monitoring the 'Referral Request Status' page.
3. You may still receive messages even after a referral is closed.

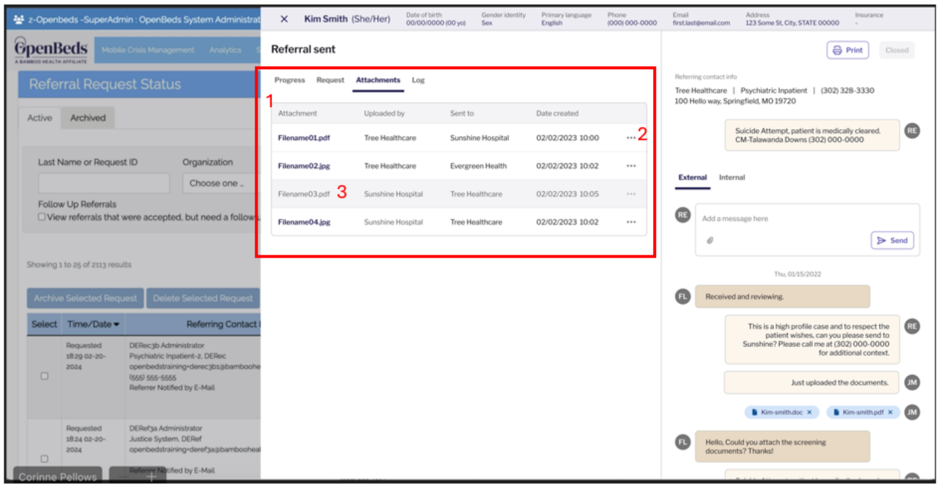
Attach a file: To attach a file, click on the paper clip icon (6), add a message, and click Send. You should be able to see the file name in the messaging section (7). You can also verify the file was successfully sent by navigating to the 'Attachments' tab and confirming the file name appears in the list.

Print a referral request: Click the 'Print' button (8) to open a PDF file of the referral request.

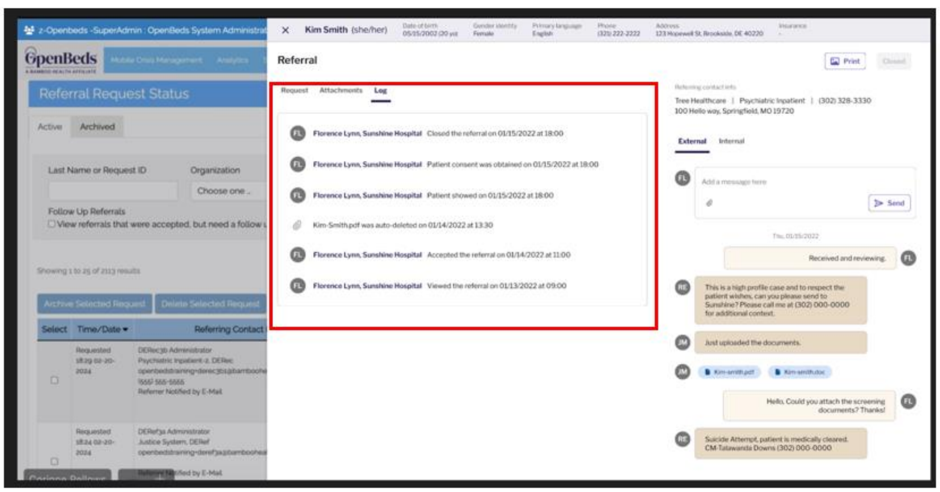
Status (9): New referral requests will have an auto default status of 'Open'. Select the appropriate status from the drop-down menu as you work through the request. See Referral Request Statuses section for additional information.

Other tabs

The Attachments tab houses all files associated with a specific referral. Files are displayed chronologically with the most recent at the bottom. Upon upload, the file name, organization adding the file, organization the file was sent to and the date/time the file was added are captured and displayed in this list (1). Click on '…' (2) to delete an attachment you added. You can't delete files uploaded by someone else. **Note:** Files will continue to be auto-deleted based on the current configured timeframe. Deleted files will be grayed out (3). You can hover over the file name to see the date/time stamp the file was deleted.



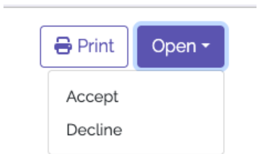
The Log tab shows the updates and activity for the specific referral.



Referral Request Statuses

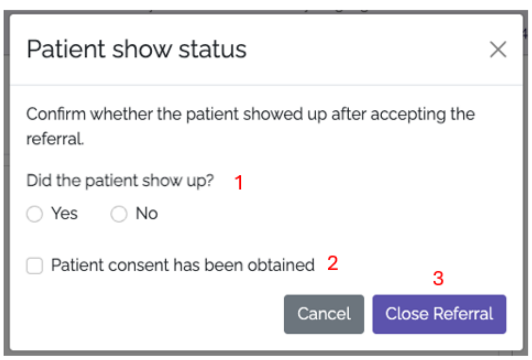
Navigate to the top-right corner of the drawer to update the referral status. Status options are ‘Open’, ‘Accepted’, ‘Declined’, and ‘Closed’.

1. Open: This is the default status for a new referral. You then have the option to Accept or Decline the referral.



2. If you are accepting the referral request, click ‘Accept’ to change the status to **Accepted**. The referral will remain Open.

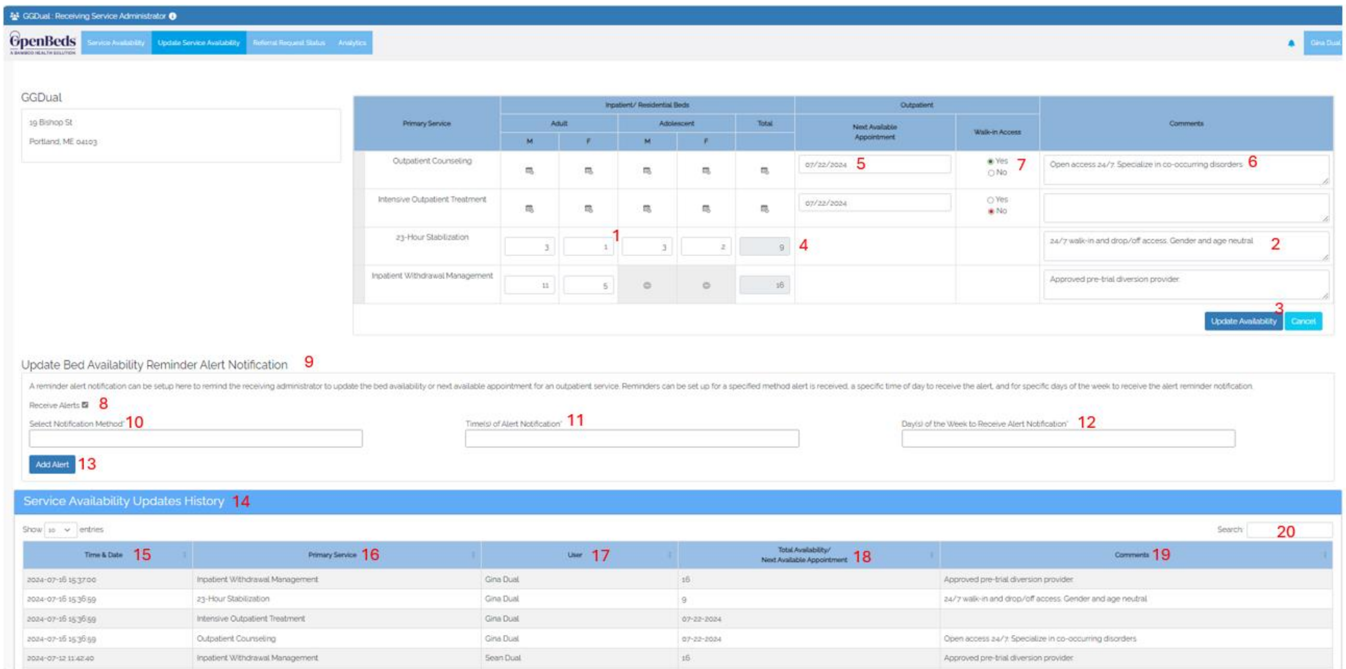
3. Select ‘Close’ from the status drop-down menu. The ‘Patient show status’ form will display in a pop-up window. Document whether the person of concern shows or fails to show (1) to close the loop with the referring organization. Then click ‘Close Referral’ (3) to change the status to **Closed**. This documents the status on the Referral Request Status page as ‘**Accepted and Closed**’. **Note**: Part 2 facilities must check the box that ‘Patient consent has been obtained’ (2). If the box is not checked, show/no show data for Part 2 facilities cannot be shared.



4. If you decline a referral, select ‘Decline’ from the status drop-down menu. The ‘Decline Referral’ form will display in the pop-up window. Select the applicable primary (1) and specific (2) reasons for this declination. Both fields are required to be completed to close the referral. Then click ‘Close Referral’ (3) to change the status to **Closed**. This documents the status as ‘**Declined and Closed**’ on the Referral Request Status page.

Update Service Availability

You will be automatically defaulted to the **Update Service Availability** page upon log in. To update available services:



1. **For inpatient/residential services**: Click into the applicable text box to update the number of available beds by gender and age group (1), add/update any relevant comments in the 'Comments' text box (2), and click the 'Update Availability' button (3). **Note**: The total number of beds (4) will auto-calculate.
2. **For outpatient services**: Click into the applicable 'Next Available Appointment' text box (5) and update accordingly. Add any relevant comments in the 'Comments' text box (6) and click the 'Update Availability' button (3). **Note**: Walk-In access (7) changes must be configured via 'Service Details'. See the **Edit an Existing Service** section below for additional information.
3. To receive reminders to update the service availability information, check the 'Receive Alerts' (8) box in the 'Update Bed Availability Reminder Alert Notification' (9) section. This exposes additional data fields with drop-down values for you to select your alert notification method (10), time(s) of the alert notifications (11), and day(s) of the week to receive the alert notifications (12). Click 'Add Alert' (13) to save your preferences and begin receiving alert notifications.

4. All updates are tracked via the 'Service Availability Updates History' (14) audit log. This log captures the date and time of the update (15), which service was updated (16) and by whom (17), the total number of beds or the next available appointment (18) captured in the update and any comments (19) included with the update. Administrators can also do a targeted 'Search' (20) by entering the primary service in the text box to quickly narrow the audit log results.

Version History

Version	Author	Date	Changes
1.0	Gina Gibson	7/26/24	First Release
2.0	Gina Gibson	8/6/24	Separated master user guide into individual user guides by role
3.0	Gina Gibson	10/30/24	Revised user guide based on consolidated referral view