Bamboo Health

OpenBeds® Crisis Management System

Referring Administrator User Guide

Revised 1/5/25

Introduction

This user guide details the responsibilities and distinct privileges of the Referring Administrator user role as outlined below.

Role	Primary Function(s)	Secondary Function(s)
Referring Administrator	• Manage referral organization users • Manage referring service(s) details • Train new staff on OpenBeds usage	• Make referrals

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

Table of Contents

Logging In

To log into your account for the first time:

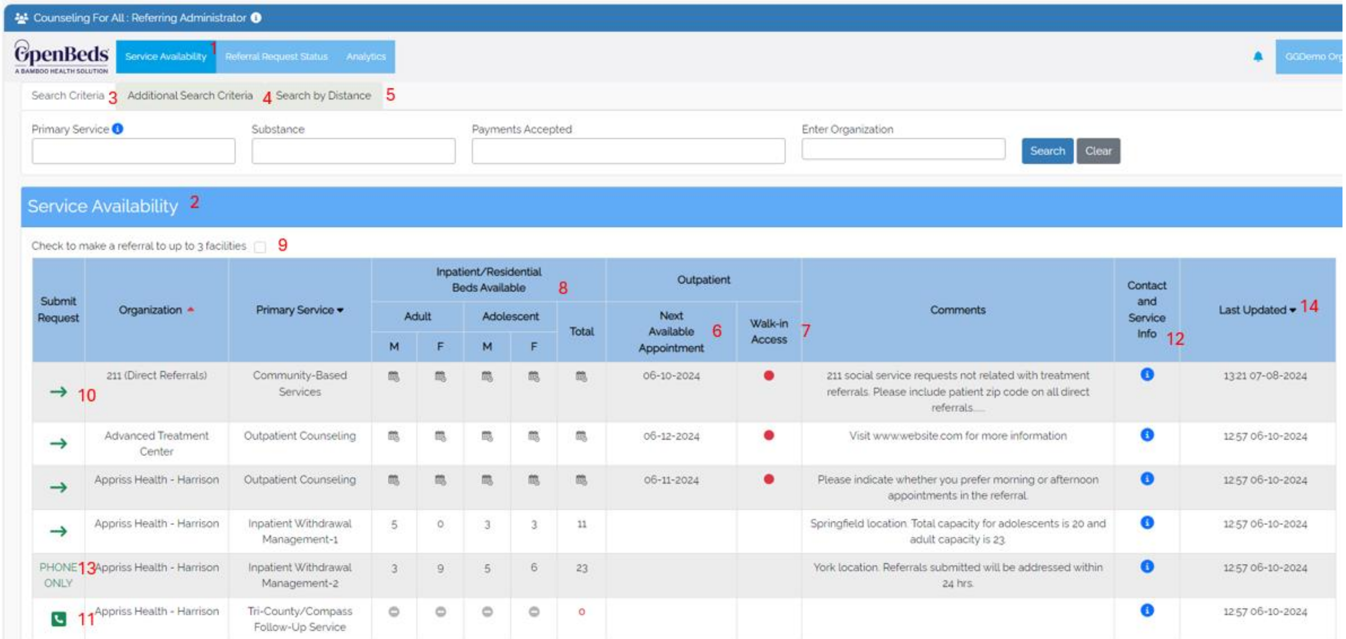
1. From your web browser, navigate to the OpenBeds URL: https://<<your state's abbreviation>> .openbeds.net/ and select "Forgot Password"
2. Enter your work email in the 'Username' box and click 'Request Password'
3. Enter the verification code sent to your email in the 'Verification Code' box
4. Create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

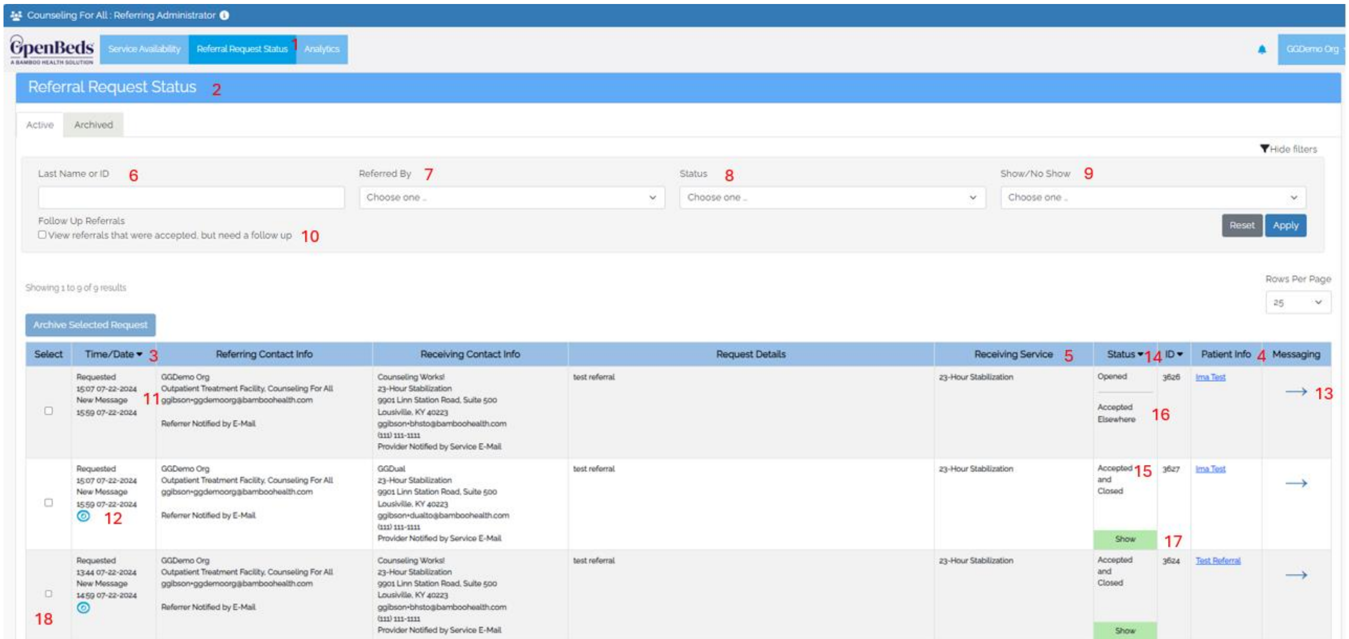
To submit a referral request:

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 their ‘Referral Request Status’ dashboard of this request.
6. **Note:** You are only able to submit referral requests. You are not able to receive referral requests.

Monitor/Manage a Referral Request

Monitor a Referral Request

To monitor the status of your referral request,

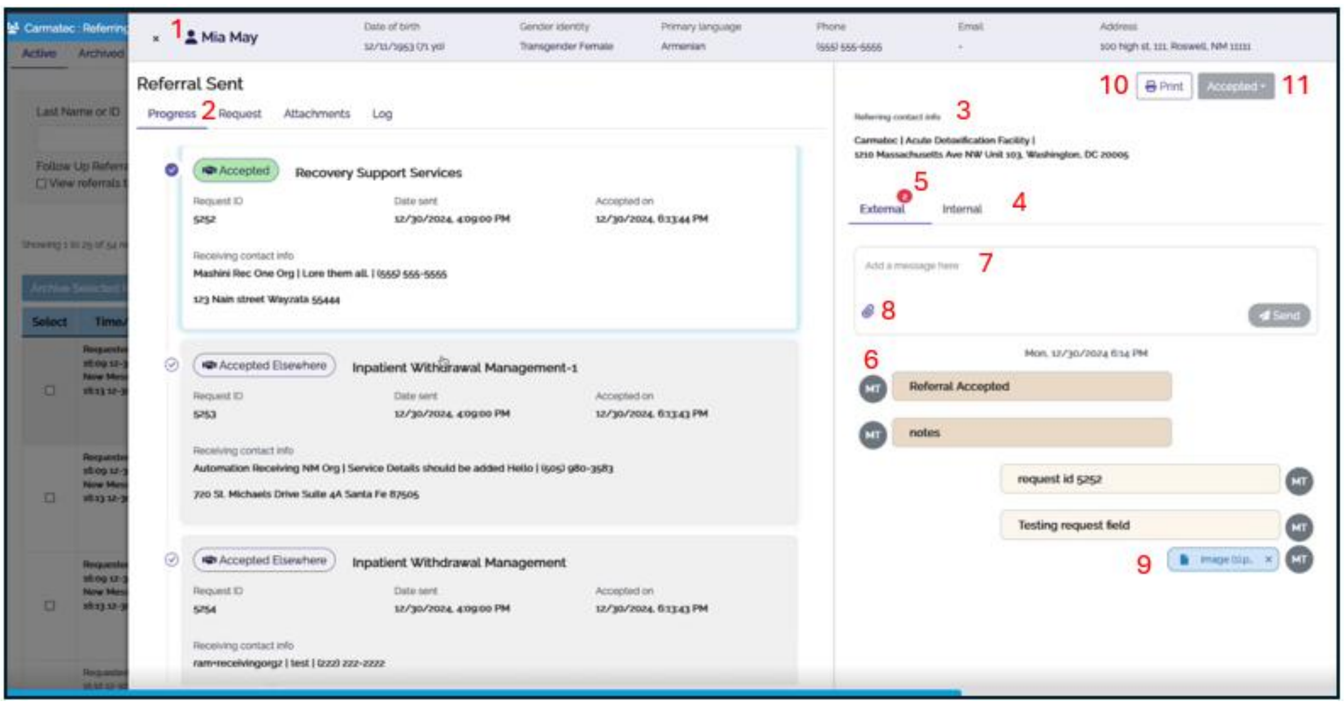


1. Navigate to the **Referral Request Status** (1) page which displays the Referral Request Status dashboard (2). **Note**: Referrals populate in chronological order by request day/time (3) with the most recent on top,
2. Select the referral you want to monitor/manage.
   a. If you are monitoring multiple 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 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).

Manage a Referral Request

Select the referral you want to manage by clicking the arrow in the 'Messaging' column of the Referral Request Status dashboard. Once clicked, 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 you completed and submitted. **Note**: If you submitted more than one simultaneous referral for the same Individual, you will be defaulted to the Progress tab instead. See the other tabs sections for additional information on the Progress, Attachments, and Log tabs.

Referring Contact Information (3): Your information including your 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 users within your service. **Note:** External users cannot see 'Internal' messages.

1. You will see a red circle with the number (5) of new unread messages on the External and/or Internal tabs.
2. Hover over the initials icon (6) to see the sender's full name, their organization, and the date/time the message was sent.
3. Send a reply message as appropriate (7) 'or simply click into the text box to clear the number of unread messages and un-bold the corresponding referral row on the 'Referral Request Status' page.
4. 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.
5. You may still send and receive messages even after a referral is closed.

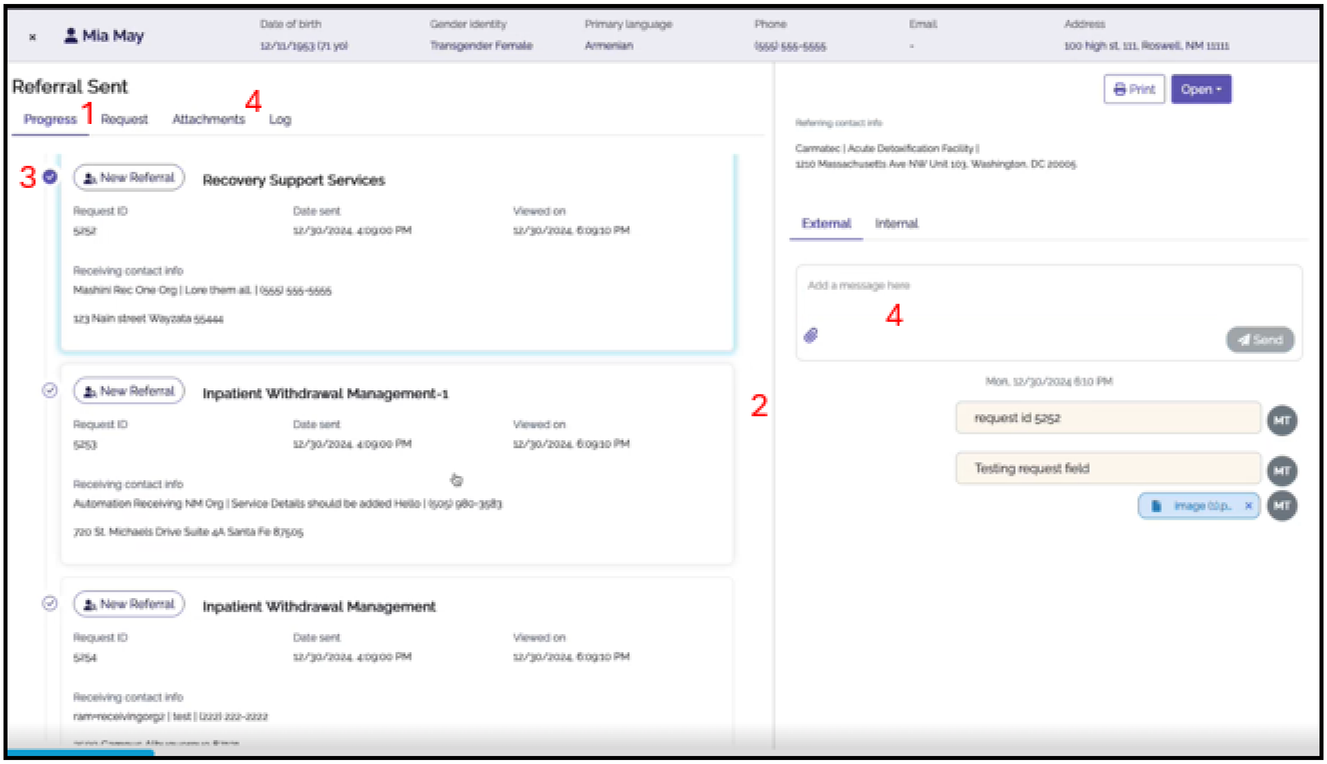
Attach a file: To attach a file, click on the paper clip icon (8), add a message, and click Send. You will be able to see the file name in the messaging section (9). You can also verify the file was successfully sent by navigating to the 'Attachments' tab and confirming the file name appears in the list. **Note**: You must click 'Send' to successfully send the attachment.

Print a referral request: Click the 'Print' button (10) to open a PDF file of the referral request.

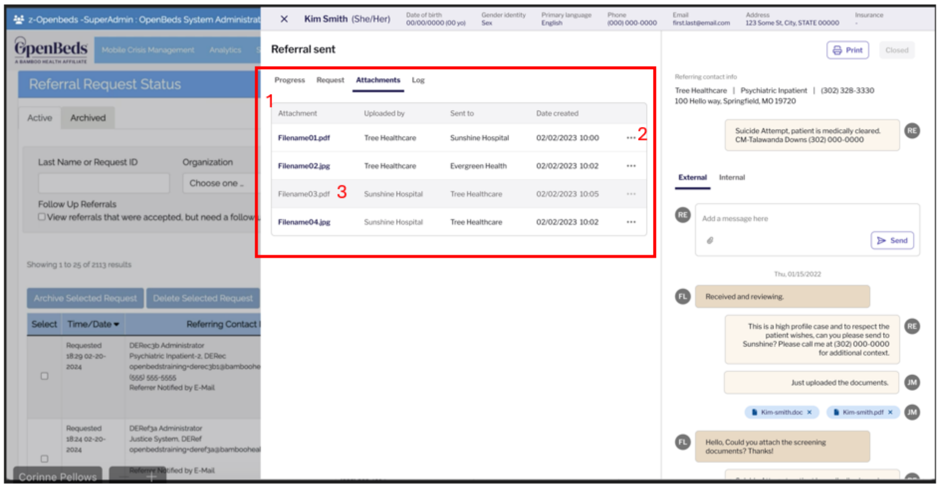
Status (11): New referral requests will have an auto default status of 'Open'. Statuses will update as the Receiving Organization works through the referral request and changes the status accordingly. See Monitor a Referral Request for additional information.

Other Tabs

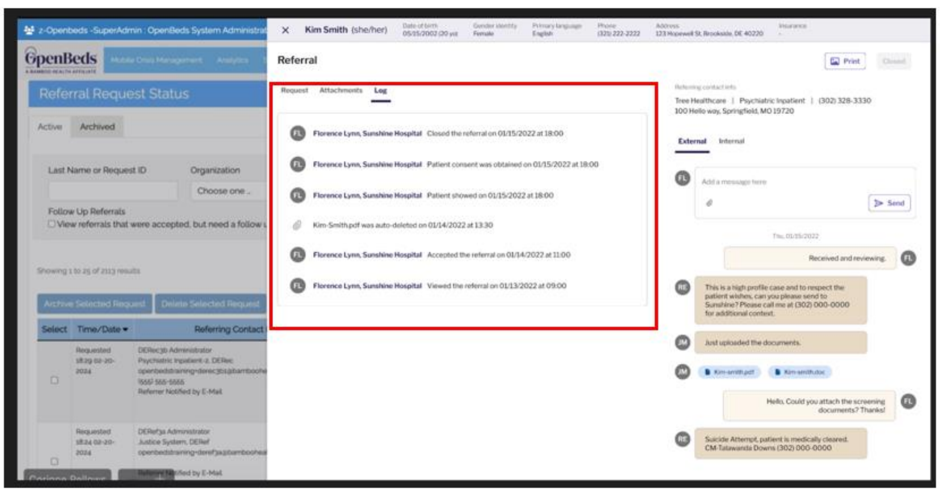
You will only see the Progress tab (1) if you submitted multiple referrals at the same time for the person of concern. This tab displays separate rows for each referral with summary information (2). Click on the applicable row (3) to bi-directionally message with the receiving organization, add/view attachments, or view the activity log for each referral (4). You are only able to view and interact with the messages, attachments, and logs for the selected referral. **Note**: The selected referral will have a blue shadow box around it for ease in identifying as you move between referrals.



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. If you delete the first attached file, it will be deleted from all multi-referral requests.



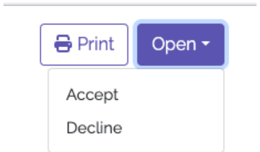
The Log tab shows the updates and activity for the specific referral.



Referral Request Statuses

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

1. Open is the default status for a new referral. Receiving Organizations then have the option to Accept or Decline the referral.



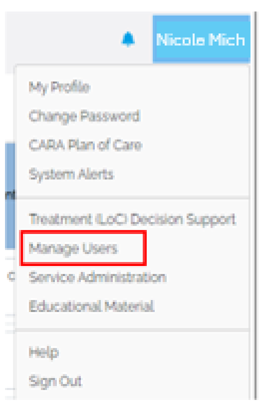
2. If the Receiving Organization accepts the referral request, the status will change to **Accepted**.

3. Similarly, if the Receiving Organization declines the referral request, the status will change to **Declined**. The referral request remains open until the Receiving Organization changes the status to **Closed**.

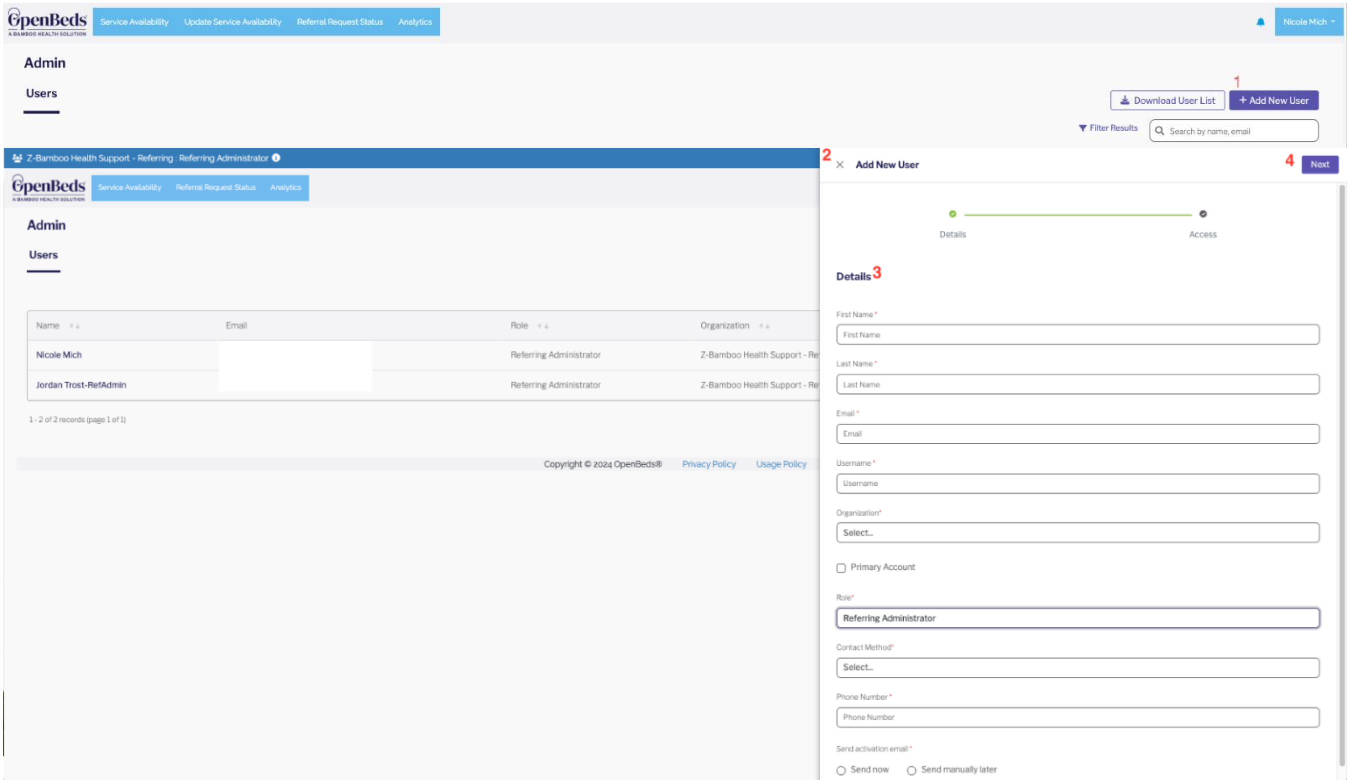
User Management

Create New User Account

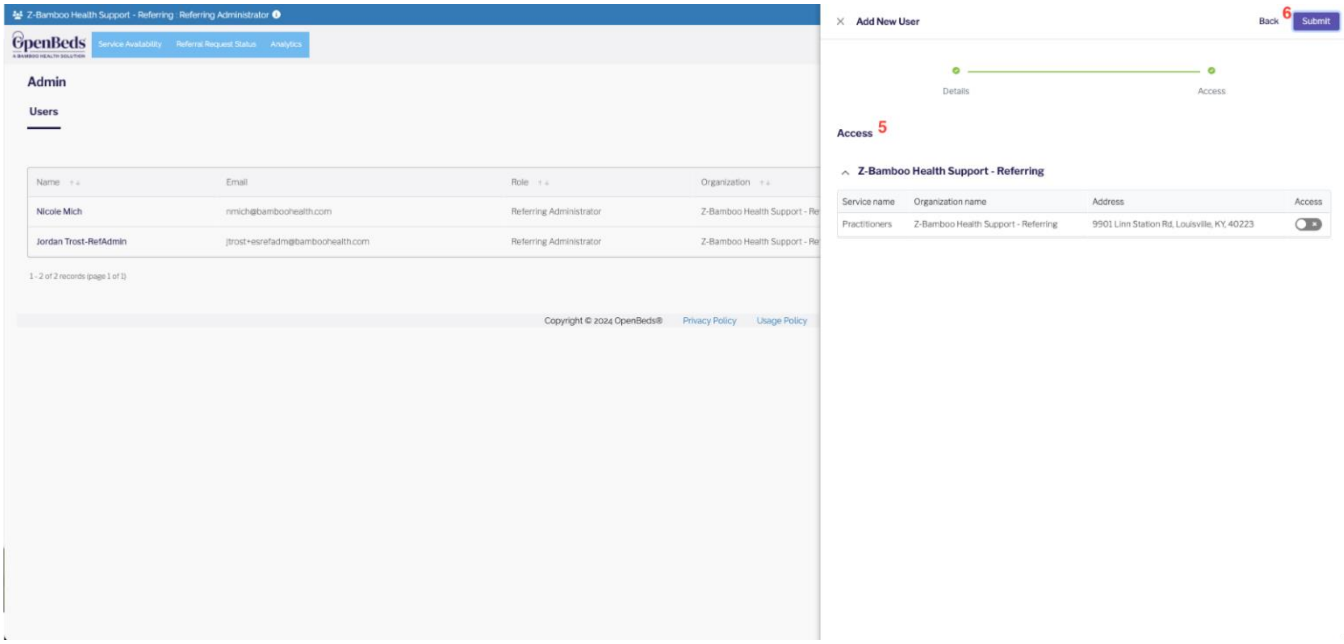
To create a new user, log into OpenBeds using your credentials, click the drop-down icon beside your name at the top right of the page, and select 'Manage Users'. **Note**: You can only create new users for the organization(s) your Administrator role is attached to.



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.



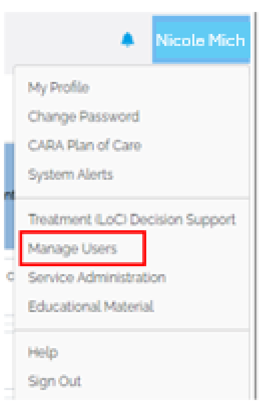
Enter the new user's details (3) and click 'Next' (4) to navigate to the 'Access' tab. **Note**: The Access tab will not display until you select a role for the new user on the 'Details' tab.

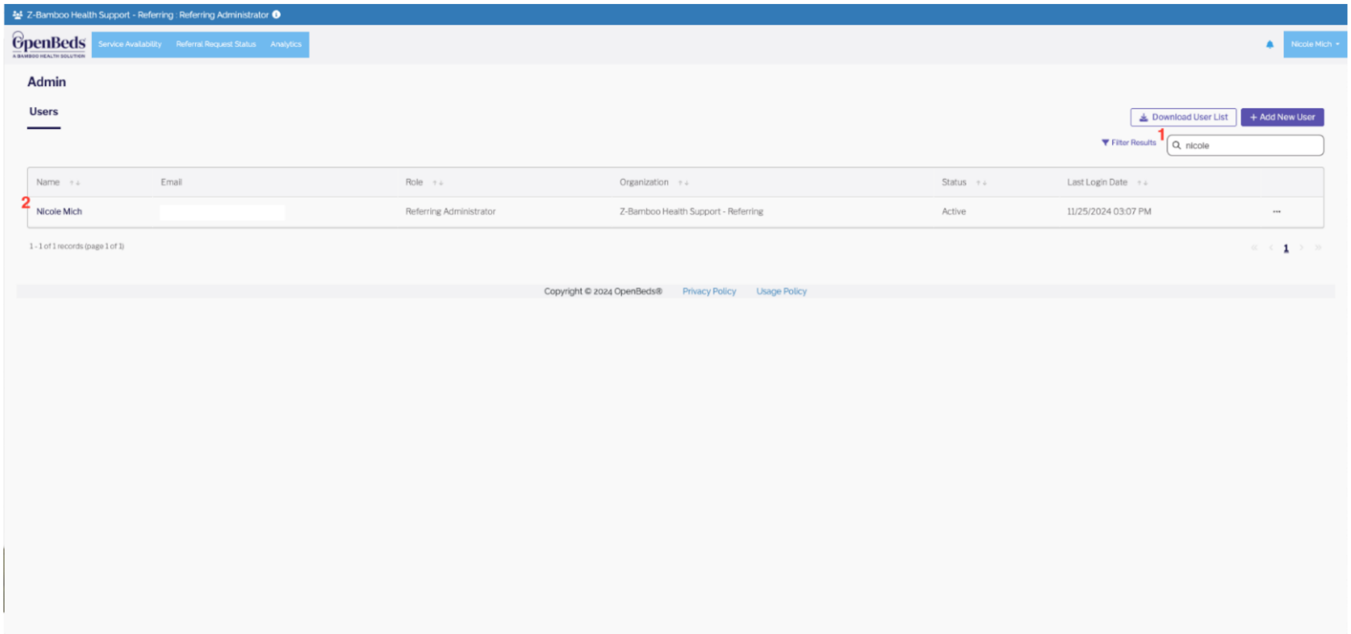


On the Access tab (5), toggle on the organization that the new user needs access to. Click ‘Save’ (6) to add the new user to your organization.

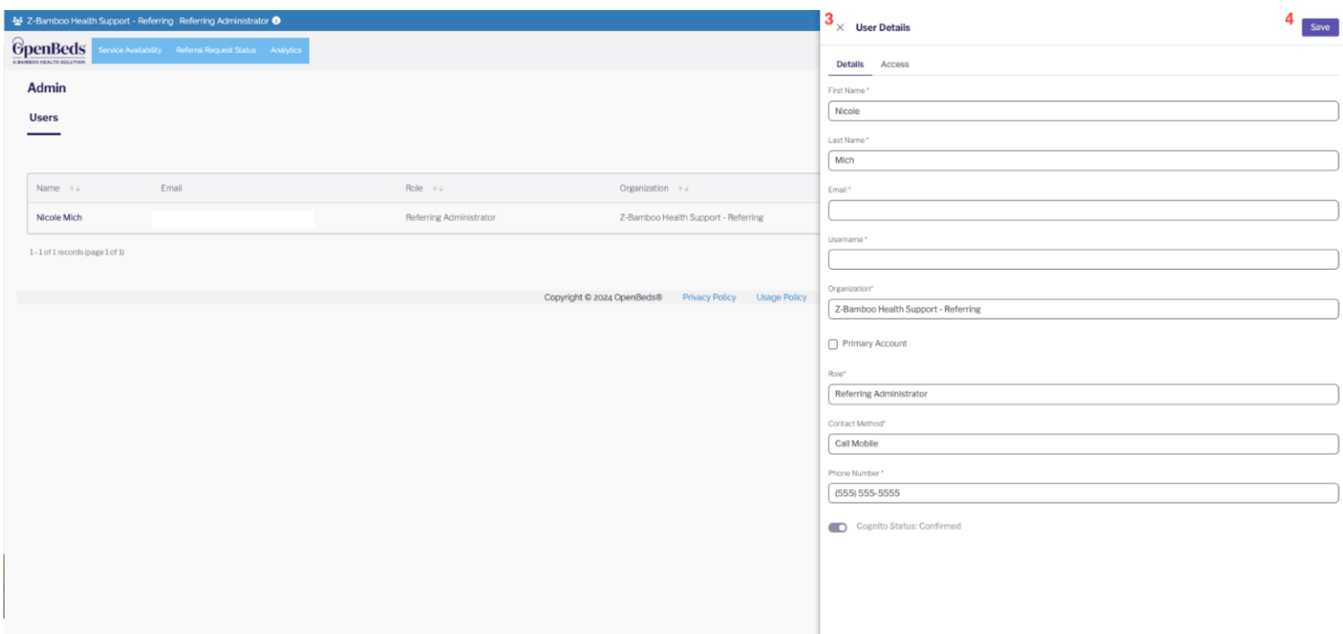
Edit an Existing User

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 provider or administrator (2).



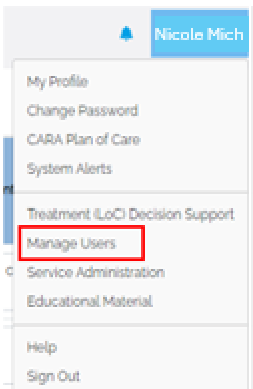
The 'User Details' drawer (3) opens for editing. You can change any data field displayed at any time, even if the user's account has been deactivated. Click 'Save' (4) to capture any changes made to the user's profile.

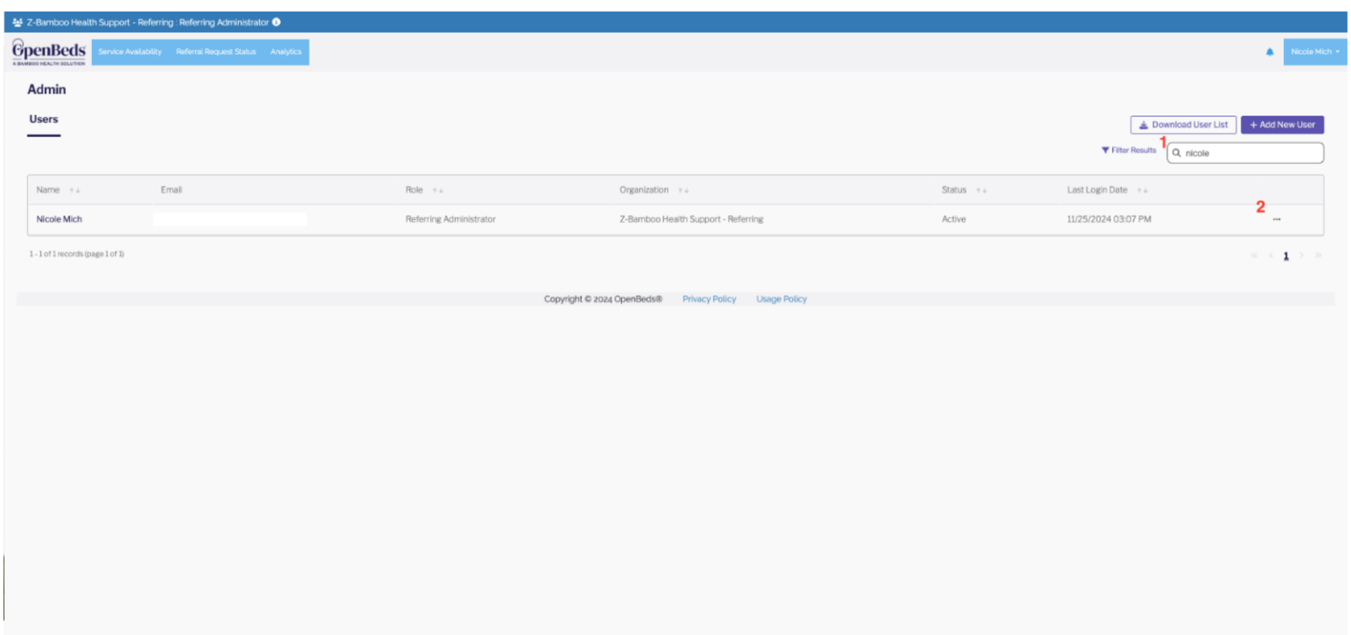
Pending Users

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'.



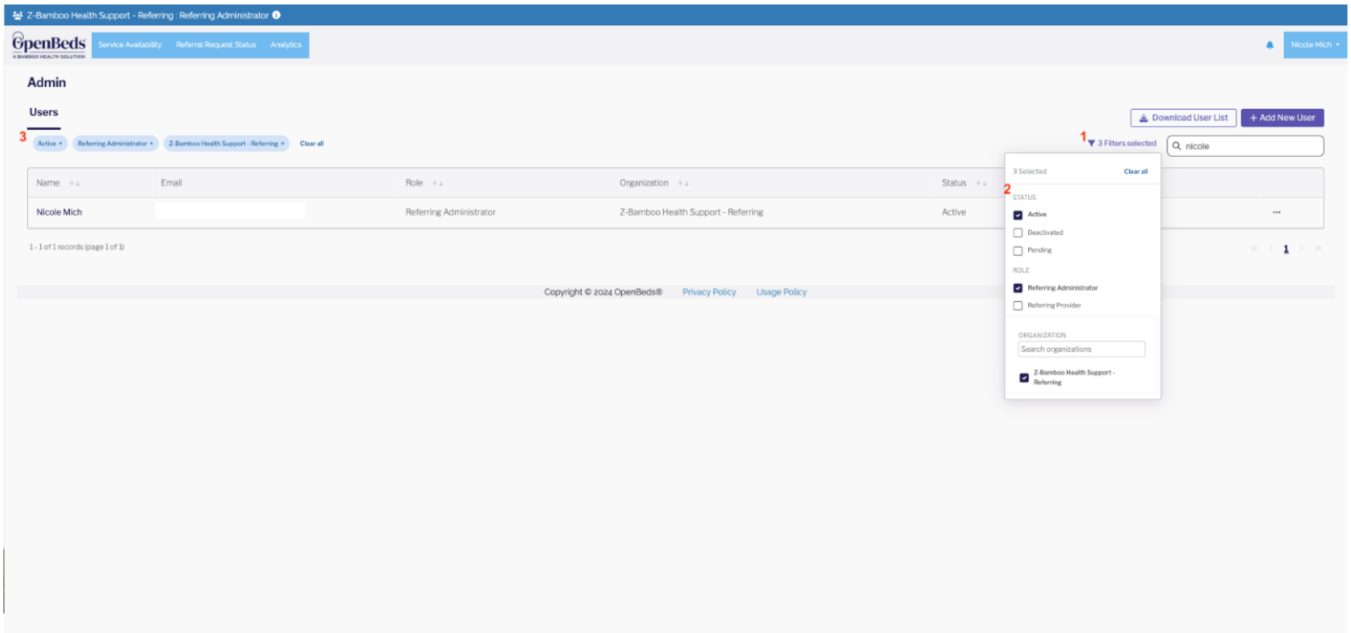


Enter the user's name or email address in the search bar (1) to display the appropriate user in the 'Users' list. Click on the '...' (2) to the right of the user's name and select 'Deactivate' or 'Restore Account' from the action menu as applicable.

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

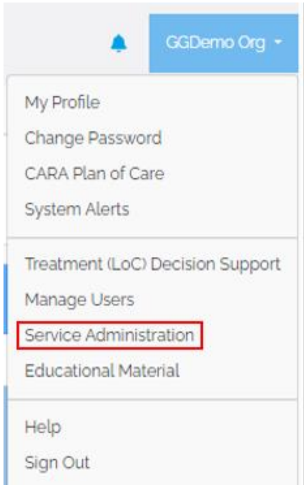
Note: Any accounts deactivated prior to the 90-day automated security deactivation process implemented on January 10, 2024 will not have an associated deactivation method.

Manage Referring Service Details

Edit Service Details

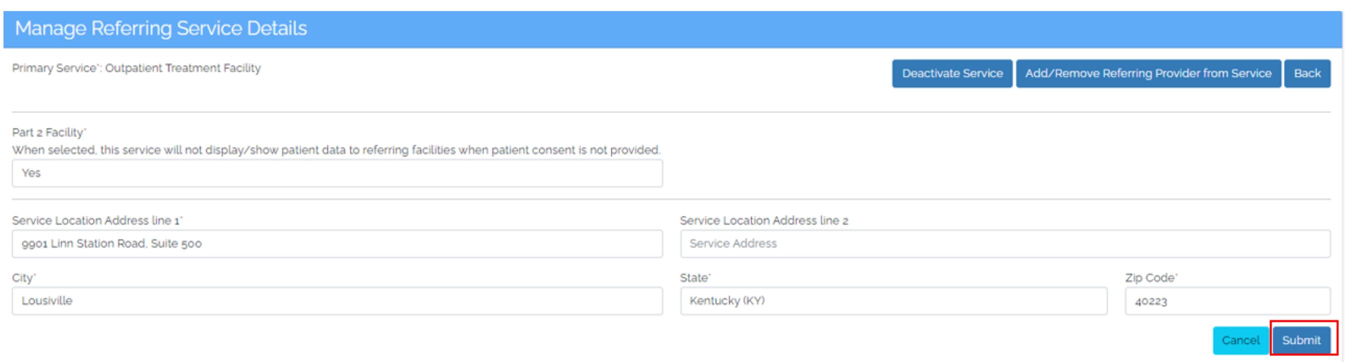
To make changes to an existing service,

1. Log into OpenBeds using your credentials.
2. Click the drop-down icon beside your name at the top of the page and select ‘Service Administration’.



3. Click on the name of the service you want to edit.

4. Make the desired changes in the text boxes on the 'Manage Referring Services Details' page and select 'Submit' to save your edits.



Version History

Version	Author	Date	Changes
1.0	Gina Gibson	7/26/24	First Release
2.0	Gina Gibson	8/5/24	Separated master user guide into individual user guides by role
3.0	Gina Gibson/ Nicole Mich	11/26/24	Incorporated the new consolidated referral view and user management functionality
3.1	Gina Gibson/ Monica Seng	1/7/25	Incorporated view and messaging enhancements to consolidated referral view