



Receiving Organization

User Guide: OpenBeds

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Updating Service Availability and Comments

1. Log into [OpenBeds](#) with your credentials
2. Navigate to 'Update Service Availability'
3. Enter in all 'Inpatient/Residential Beds', 'Next Available Appointments', 'Walk In Access', and 'Comments'
4. Select 'Submit'

Map Rec.org - Receiving Service Administrator

OpenBeds
A BAMBOO HEALTH AFFILIATE

Service Availability **Update Service Availability** Referral Request Status Analytics

Map Rec.org

123 main st
Orlando, FL 32843

Primary Service	Inpatient/ Residential Beds					Outpatient		Comments
	Adult		Adolescent		Total	Next Available Appointment	Walk-in Access	
	M	F	M	F				
Intensive Outpatient Treatment	-	-	-	-	-	03/29/2023	<input checked="" type="radio"/> Yes <input type="radio"/> No	Please have negative covid test 48 hours prior to arrival.
Recovery Support Services-1	-	-	-	-	-	03/30/2023	<input checked="" type="radio"/> Yes <input type="radio"/> No	Walk-ins are now available. Covid negative test required 48 hours prior to arrival.
Residential Substance Use Treatment -1	10	15	5	5	35	-	-	Programs available: 12 Step Based, SMART Recovery, Dharma Recovery, Weekly individual counseling and case
Residential Substance Use Treatment -2	10	-	5	-	15	-	-	Annex for our Residential SUD program Based, SMART Recovery, Dharma Recovery, Weekly individual counseling
Psychiatric inpatient	7	10	-	-	17	-	-	We offer a supportive and non-punitive environment where growth and treatment can occur. We provide CBT, EMDR.

Update Bed Availability Reminder Alert Notification

A reminder alert notification can be setup here to remind the receiving administrator to update the bed availability or next available appointment for an outpatient service. Reminders can be set up for a specified method alert is received, a specific time of day to receive the alert, and for specific days of the week to receive the alert reminder notification.

Receive Alerts

Setting Daily Reminders

1. Log into [OpenBeds](#) with your credentials
2. Navigate to 'Update Service Availability'
3. Toggle 'Receive Alerts' to the right.
4. Under 'Select Notification Method' enter 'Email'
5. Under 'Time(s) of Alert Notification' select desired times (times are in 24-hour clock format)
6. Under 'Day(s) of the Week to Receive Alert Notification' select days of week
7. Select 'Add Alert'

Map Rec.org | Receiving Service Administrator

OpenBeds | Service Availability | Update Service Availability | Referral Request Status | Analytics

Map Rec.org

123 Main St
Omak, FL 98541

Primary Service	Inpatient/ Residential Beds					Outpatient		Comments
	Adult		Adolescent		Total	Next Available Appointment	Walk-in Access	
	M	F	M	F				
Intensive Outpatient Treatment	-	-	-	-	-	09/29/2023	<input checked="" type="radio"/> Yes <input type="radio"/> No	Please have negative covid test 48 hours prior to arrival.
Recovery Support Services-1	-	-	-	-	-	09/30/2023	<input checked="" type="radio"/> Yes <input type="radio"/> No	Walk-ins are now available. Covid negative test required 48 hours prior to arrival.
Residential Substance Use Treatment -1	10	15	5	5	35	-	-	Programs available: 12 Step Based SMART Recovery, Dharma Recovery, Weekly individual counseling and case
Residential Substance Use Treatment -2	10	-	5	-	15	-	-	Annex for our Residential SUD program Based SMART Recovery, Dharma Recovery, Weekly individual counseling
Psychiatric Inpatient	7	10	-	-	17	-	-	We offer a supportive and non-punitive environment where growth and treatment can occur. We provide CBT, EMDR

Update Availability Cancel

Update Bed Availability Reminder Alert Notification

A reminder alert notification can be setup here to remind the receiving administrator to update the bed availability.

Receive Alerts:

Select Notification Method:

Time(s) of Alert Notification:

Day(s) of the Week to Receive Alert Notification:

Add Alert

Checking Referral Request Status Queue – Responding to Referrals

1. Log into [OpenBeds](#) with your credentials
2. Navigate to 'Referral Request Status'
3. If you have referrals in queue, you will see them as show below (be sure to check Active and Archived tabs):

The screenshot shows the 'Referral Request Status' page in the OpenBeds interface. The 'Active' tab is selected. The table below shows one referral request:

Select to Archive	Time/Date	Referring Contact Info	Receiving Contact Info	Request Details	Receiving Service	Status	ID	Patient Info	Messaging
<input type="checkbox"/>	New Request 12/22 03-28-2023	Matt Yacovone Substance Use Inpatient, Aprpris Ref Org myacovone@bamboohealth.com Referrer Notified by E-Mail	Map Rec org Residential Substance Use Treatment -1 123 Main San Antonio, TX 78216 myacovone@bamboohealth.com 0210 123-1234 Provider Notified by Service E-Mail	Please acknowledge this referral	Residential Substance Use Treatment	Opened	3140	John Smith	→

4. To respond to an open referral, select the arrow under 'Messaging'

This screenshot is identical to the previous one, but with a red box highlighting the arrow icon in the 'Messaging' column of the table row.

6. Under 'Status' you can "Accept or Decline" and mark it as "Opened or Closed"

7. Select Send

Map Rec org - Receiving Provider

OpenBeds
A BAMBOO HEALTH AFFILIATE

Service Availability Update Service Availability Referral Request Status Analytics

Matt Yacovone

Referral Request Messaging

Request ID 3140 Back Refresh

Show 25 entries Search:

Time/Date	Name	Role	Activity	Action/Message	Attachment
2023-03-28 12:22:34	Matt Yacovone	Referring Administrator	Opened	Please acknowledge this referral.	

Showing 1 to 1 of 1 entries Previous 1 Next

Send Message

Messages and notifications of messages are automatically received by sending and receiving providers.

You can respond to the referral here.

Choose Files | No file chosen

Select below to notify your team members

Select

Send ←

Status Opened Closed ← Accepted Declined ←

Did Patient Show Up? Yes No

Check one or more permitted check box or button, add message, and click on 'Send' to change status and send message.

Local Action

Actions are only seen locally at your organization. Add a note in the box below and click on 'Save' for your own purposes.

Select below to notify your team members

Select

Save

Treatment Availability Dashboard

Overview

Service Availability												
Check to make a referral to up to 3 facilities <input type="checkbox"/>												
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	🛏	🛏	🛏	🛏	🛏	05-17-2023	●	211 social service requests not related with treatment referrals. Please include patient zip code on all direct referrals.	📘	10:34 06-22-2023
→	Advanced Treatment Center	Outpatient Counseling	🛏	🛏	🛏	🛏	🛏	05-18-2023	●	Phone only - Please call 555-555-5555 or visit www.website.com for more information	📘	13:42 05-15-2023
→	Appriss Health - Harrison	Outpatient Counseling	🛏	🛏	🛏	🛏	🛏	05-24-2023	●	Please indicate whether you prefer morning or afternoon appointments in the referral.	📘	13:42 05-15-2023
→	Appriss Health - Harrison	Inpatient Withdrawal Management-1	2	2	3	3	10			Springfield location. Total capacity for adolescents is 20 and adult capacity is 23.	📘	13:42 05-15-2023

- Submit Request** – Use green arrow to start a digital referral.
- Organization** – The organization name providing the service.
- Primary Service** – The service offered at that organization and the availability for that service (beds or appointments).
- Inpatient/Residential Beds Available** – For inpatient services, bed availability will be given in this column and is broken down by Adults/Adolescent and Male/Female beds that roll up to a total count.
- Outpatient** – For outpatient services, appointment availability will be given in this column and is broken down by Adults/Adolescent and Male/Female beds that roll up to a total count. Walk-in access will also be shown here by either a green dot (yes) or red dot (no).
- Contact and Service Info** – Click the blue i icon to view the organizations address, contact information, as well as read up on the demographics they serve/details of their service.
- Last Update** – This timestamp shows the last time an organization updated their availability.

Sending a Digital Referral

Utilizing the search filters

Search Criteria | Additional Search Criteria | Search by Distance

Filter by the identified fields in the Search bar to narrow down the treatment centers on the network to find the best fit for your individual seeking care.

- Each field allows for multi-select
- You can add filters within multiple columns and it will all be taken into consideration in the overall search

Sending a Referral

1. Determine the organization/s you want to send a referral to
2. Read the Comments section to determine if certain documentation is needed in a referral or other details regarding the service
 - a. Intake forms can be found in the Contact and Service Info icon (download and complete)

Contact

Treatment Organization	Advanced Treatment Center
Primary Service	Outpatient Counseling
Service Address	33 State Street ,New Albany, IN, 47150
Service County	Floyd
Service e-mail	openbeds123+demo@gmail.com
Service Phone	(555) 555-5555
Substances Treated	Cannabis
Gender and Age Focus	Adult - Male, Adult - Female, Youth (17 and under) - Male, Youth (17 and under) - Female
Providers on Site	Psychiatrist on site
Payment Accepted	Federal military insurance, Medicaid-AmeriHealth, Medicaid-Highmark, Medicare, No Insurance, Private health insurance, Self-pay, Sliding fee scale
Intake form	Uploading An Intake Form For A Service.pdf

3. Once documents are completed, click the green arrow under submit request
 - a. To send one referral to up to three facilities, check the box under the Service Availability banner

Service Availability												
Check to make a referral to up to 3 facilities <input type="checkbox"/>												
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	📞	📞	📞	📞	📞	05-17-2023	●	211 social service requests not related with treatment referrals. Please include patient zip code on all direct referrals.	📄	10:34 06-22-2023
→	Advanced Treatment Center	Outpatient Counseling	📞	📞	📞	📞	📞	05-18-2023	●	Phone only - Please call 555-555-5555 or visit www.website.com for more information	📄	13:42 05-15-2023
→	Appriss Health - Harrison	Outpatient Counseling	📞	📞	📞	📞	📞	05-24-2023	●	Please indicate whether you prefer morning or afternoon appointments in the referral.	📄	13:42 05-15-2023
→	Appriss Health - Harrison	Inpatient Withdrawal Management-1	2	2	3	3	10			Springfield location. Total capacity for adolescents is 20 and adult capacity is 23.	📄	13:42 05-15-2023
PHONE ONLY	Appriss Health - Harrison	Inpatient Withdrawal Management-2	3	9	5	6	23			York location. Referrals submitted will be addressed within 24 hrs.	📄	13:42 05-15-2023

4. Fill out the digital referral form
 - a. Not all fields are required, but we recommend to give as much information as possible
 - b. Be sure to attach any intake forms, medical history, or other required documentation for a referral in the *Attachments* section
 - i. You can attach several documents
 - ii. Attachments will auto-delete after 7 days

Referral Request

Contact Information

Treatment Organization: 211 (Direct Referrals)

Service: Community-Based Services

Address: 9901 Linn Station Road, Louisville, KY 40223

County: Jefferson

Phone Number: (555) 555-5555

Email: mreinhart@bamboohealth.com

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:

Date Of Birth:

Phone Number:

Gender Identity: -- Select Gender --

Age:

Address line 1:

Address line 2:

City:

State: -- 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: Browse
You may attach several documents

5. Hit *Submit* when completed
 - a. The treatment facility will receive an email notification alerting them of a new referral request

OpenBeds User Guide for Receiving Administrators

The below section covers features that only belong to Administrative users within your account

Receiving Administrator Privileges

A Receiving Administrator can create, edit, and delete users/services and run analytics specific to their organization. An organization can have multiple Receiving Administrators which will have access to all services for that organization.

- A Receiving Organization has one or multiple Receiving Services.
- A Receiving Administrator can have multiple Receiving Administrator Administrators, each assigned to one or multiple distinct Receiving Service(s).
- A Receiving Administrator can search, update availability, receive referrals, and view the analytics of any of the organization's Services.
- A Receiving Administrator can also refer a patient to other Receiving Service providers within his own organization or outside.

Logging In

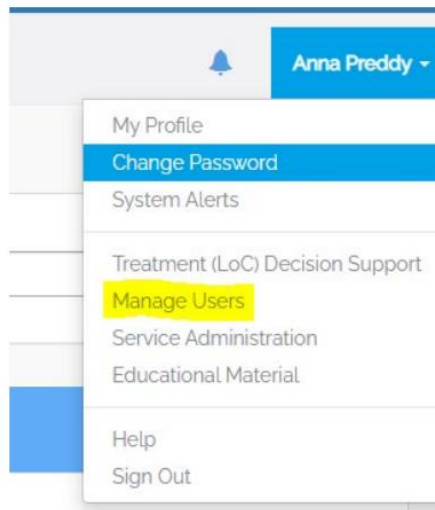
- Login at the [OpenBeds](#)
- Enter your username which is your work e-mail that you used to create your account.
- Enter your password. This may be changed at Change Password link in the menu under your name at the top right.

Manage Users for the Organization

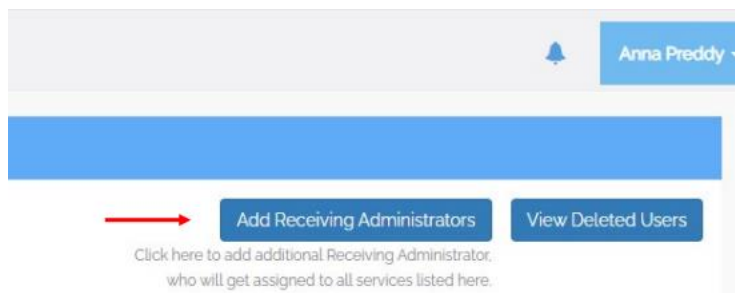
Create Users:

Receiving Administrators (These users can edit/add users to the account. If they should not have this accessibility, please see below on how to add them as Provider users. Admins can still send referrals.)

1. Log into [OpenBeds](#) with your credentials
2. Navigate to your name dropdown at the top right side of the screen
 - a. Select 'Manage Users'



3. Select 'Add Receiving Administrator'



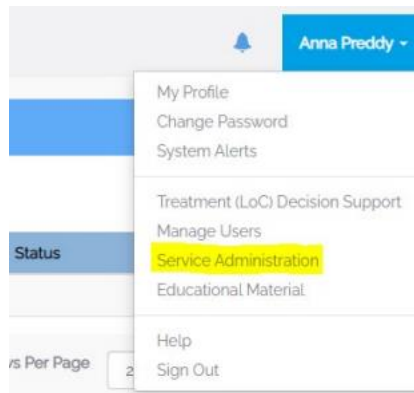
4. An 'Add Receiving Administrator' form should populate. Please fill out all the necessary fields.

5. Select 'Submit'
6. [Direct your created Receiving Administrator to login and have them reset their password to gain access.](#)

Receiving Provider (Can send referrals but cannot edit account users)

*If you are adding a user to more than one service on your account, you will need to submit a ticket to [OpenBeds Support](#) before creating the users. Support will need to connect these accounts together and enable Multi-Account Selection for the account.

1. Log into [OpenBeds](#) with your credentials
2. Navigate to your name dropdown at the top right side of the screen.
 - a. Select 'Service Administration'



3. Select the service the Receiving Provider should have access to. You do this simply by clicking the service name.

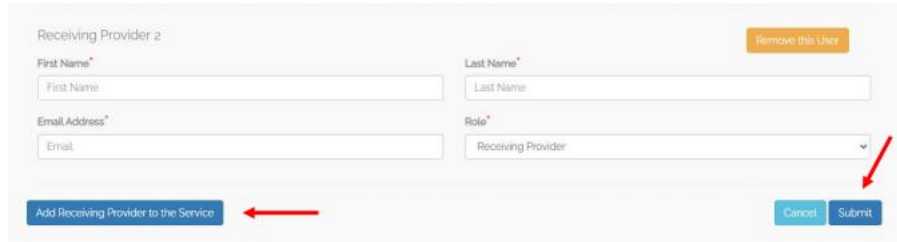
Manage Services

ID	Primary Service
136	Crisis Stabilization
137	Medication-Assisted Treatment: OTP
135	Recovery Housing

4. Select 'Add/Remove Receiving Provider from Service' at the top of the 'Manage Receiving Service Details' page.



5. Select 'Add Receiving Provider from Service' at the bottom of the page.
6. Input Receiving Providers Information. Select 'Submit'

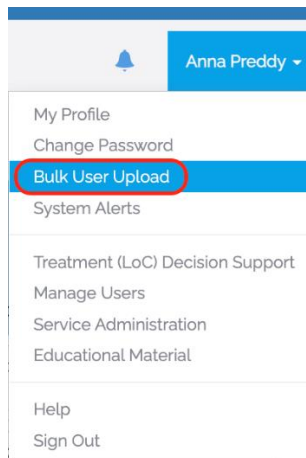


7. [Direct your created Receiving Provider to login.](#)

Bulk User Upload

The bulk user upload tool is available for any receiving administrator to assist in the creation of multiple users. Bulk User Upload is an internal tool to the OpenBeds network that will automatically create multiple users with the completion/submission of an excel spreadsheet. The Administrator will detail users' first and last name, email address, and role type.

1. Log into [OpenBeds](#) with your credentials
2. Navigate to your name dropdown at the top right side of the screen.
 - a. Select 'Bulk User Upload'



3. Follow and Complete Step 1
4. Follow and Complete Step 2

Bulk Create Users
Bulk File List

Step 1 - Download CSV Template Instructions

Download Bulk User CSV Template Instructions:

Please enter the following data into each row of the template: last name, first name, and email address of each user you want to create. The roles and services that populate the template will depend on the role and organization you used to sign into the system. Please enter a 1 in the columns for the roles and services that you want the user to have access. Please enter a 0 in the columns for the roles and services that you do not want the user to have access. At least one role must be selected for the user to be created in the system.

[Download Bulk User CSV Template](#)

Step 2 - Upload Completed Files

Upload Bulk User CSV File Instructions:

A bulk user CSV file can be uploaded by a drag and drop file feature or through a browse local/network drive to attach a file for submission. After a file is selected the user must click the Submit button to complete the upload process. If a processed file is unsuccessful it will be stored on the bulk file list. You can download the file with the reason that they failed.

Please select the organization for which you want to bulk upload users to:

211 (Direct Referrals)
▼

Drag and Drop files to Add to Queue

Or

+ Choose Files No file chosen

Start upload
Cancel upload

5. [Direct your created Receiving Provider to login and have them reset their password to gain access.](#)

Edit Users:

1. Log into [OpenBeds](#) with your credentials
2. Navigate to your name dropdown at the top right side of the screen.
 - a. Select 'Manage Users'

Manage Users

Add Receiving Administrators
View Deleted Users

Click here to add additional Receiving Administrator, who will get assigned to all services listed here.

ID	Primary Service	User Name	User Role	Status	Actions
#687	Referring Service	Anna Preddy	Receiving Provider	Pending	Review/Edit Delete
#731	Medication-Assisted Treatment: OTP	Hermione Granger	Receiving Provider	Accepted	Review/Edit Delete
#729	Recovery Housing	Harry Potter	Receiving Provider	Accepted	Review/Edit Delete
#728	Medication-Assisted Treatment: OTP	Albus Dumbledore	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Referring Service	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Medication-Assisted Treatment: OTP	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Crisis Stabilization	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Recovery Housing	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete

- a. Select 'Review/Edit' to whichever user you would like to edit.
- b. Select 'Save' after any edits

Delete Users:

1. Log into [OpenBeds](#) with your credentials
2. Navigate to your name dropdown at the top right side of the screen.
 - b. Select 'Manage Users'

Manage Users

Add Receiving Administrators
View Deleted Users

Click here to add additional Receiving Administrator, who will get assigned to all services listed here.

ID	Primary Service	User Name	User Role	Status	Actions
#g87	Referring Service	Anna Preddy	Receiving Provider	Pending	Review/Edit Delete
#731	Medication-Assisted Treatment: OTP	Hermione Granger	Receiving Provider	Accepted	Review/Edit Delete
#72g	Recovery Housing	Harry Potter	Receiving Provider	Accepted	Review/Edit Delete
#728	Medication-Assisted Treatment: OTP	Albus Dumbledore	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Referring Service	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Medication-Assisted Treatment: OTP	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Crisis Stabilization	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Recovery Housing	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete

3. Select 'Delete' to whichever user you would like to delete.

Restore a Deleted User

1. Log into [OpenBeds](#) with your credentials
2. Navigate to your name dropdown at the top right side of the screen.
 - a. Select 'Manage Users'

Manage Users

Add Receiving Administrators
View Deleted Users

Click here to add additional Receiving Administrator, who will get assigned to all services listed here.

ID	Primary Service	User Name	User Role	Status	Actions
#987	Referring Service	Anna Preddy	Receiving Provider	Pending	Review/Edit Delete
#731	Medication-Assisted Treatment: OTP	Hermione Granger	Receiving Provider	Accepted	Review/Edit Delete
#729	Recovery Housing	Harry Potter	Receiving Provider	Accepted	Review/Edit Delete
#728	Medication-Assisted Treatment: OTP	Albus Dumbledore	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Referring Service	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Medication-Assisted Treatment: OTP	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Crisis Stabilization	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete
#722	Recovery Housing	Anna Preddy	Receiving Service Administrator	Accepted	Review/Edit Delete

4. Select 'View Deleted Users' in the top right-hand corner.
5. A list of deleted users will populate. Select 'Restore' next to the user you would like to restore.

Manage Users

Add Receiving Administrators
View Existing Users

Click here to add additional Receiving Administrator, who will get assigned to all services listed here.

ID	Primary Service	User Name	User Role	Status	Actions
#868	Crisis Stabilization	anna preddy	Receiving Provider	Deleted	Restore
#771	Referring Service	test test	Receiving Service Administrator	Deleted	Restore
#771	Medication-Assisted Treatment: OTP	test test	Receiving Service Administrator	Deleted	Restore
#771	Recovery Housing	test test	Receiving Service Administrator	Deleted	Restore

6. [Direct your created Receiving Provider to login.](#)

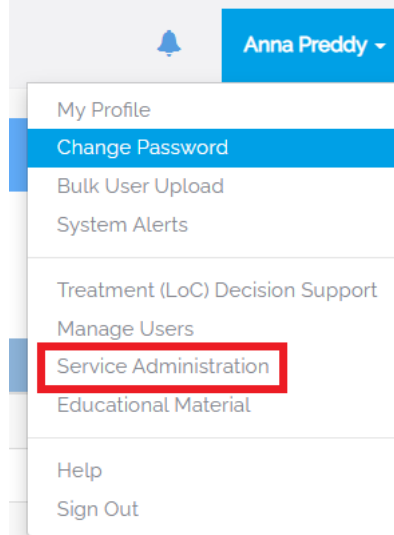
IMPORTANT!

Users stated as 'Pending' indicate that they have not yet signed into their newly created account. If a user is notated as being pending, please guide the user to perform the [login instructions](#).

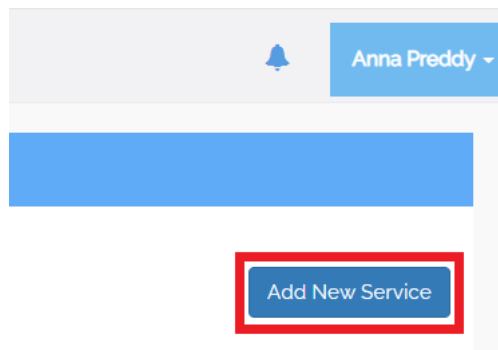
Manage Services for Organization

Create a new Service

1. Log into [OpenBeds](#) with your credentials
2. Navigate to your service selection dropdown at the top right side of the screen
 1. Select 'Service Administration'



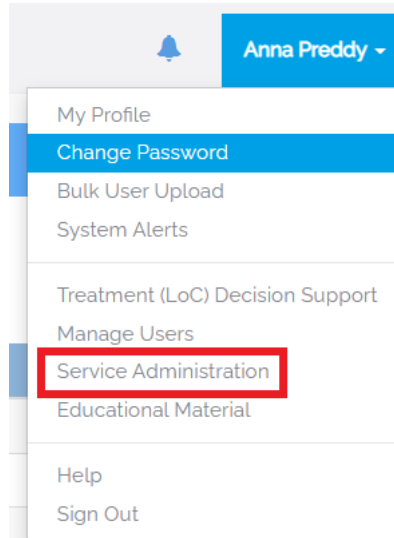
3. Select 'Add New Service' on the right side of the page under the drop down.



4. Fill out the form completely. Select 'Submit'

Edit an Existing Service

1. Log into [OpenBeds](#) with your credentials
2. Navigate to your service selection dropdown at the top right side of the screen
Select 'Service Administration'



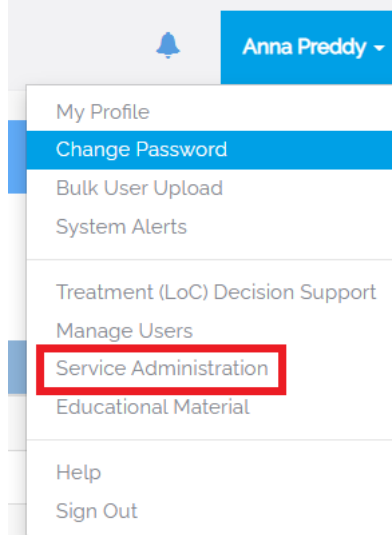
3. Select the Service you would like to edit by selecting the Service name.

Manage Services	
ID ▾	Primary Service ▲
136	Crisis Stabilization
137	Medication-Assisted Treatment: OTP
135	Recovery Housing

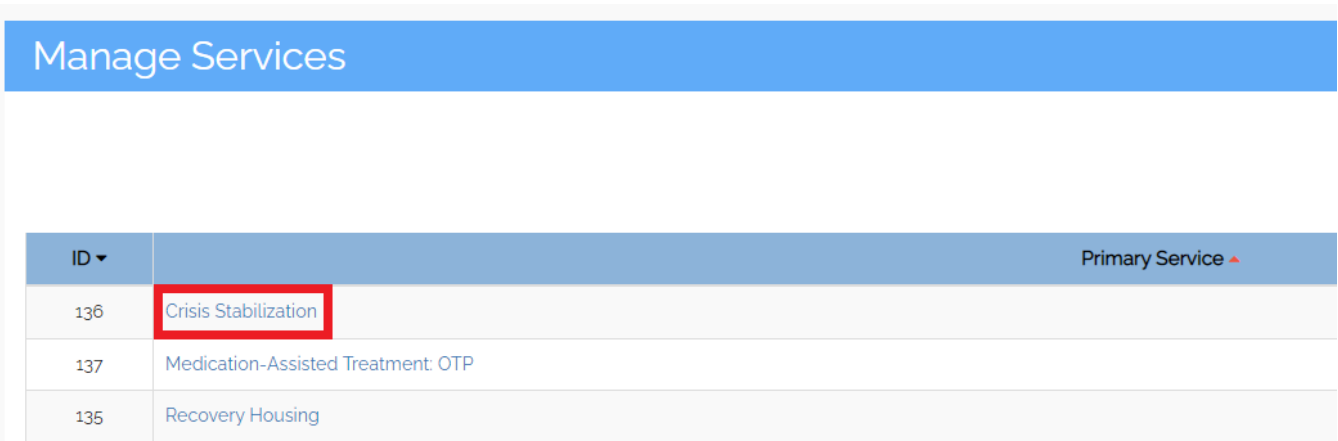
4. Edit the necessary fields. Save edits by selecting 'Submit'

Deactivating a Service

1. Log into [OpenBeds](#) with your credentials
2. Navigate to your service selection dropdown at the top right side of the screen
 1. Select 'Service Administration'

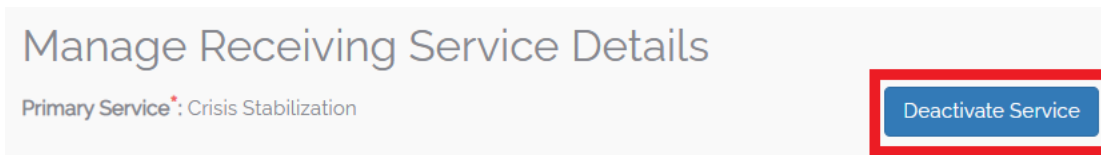


3. Select the Service you would like to deactivate by selecting the Service name.

A screenshot of the 'Manage Services' page. The page has a blue header with the text 'Manage Services'. Below the header is a table with three columns: 'ID', 'Service Name', and 'Primary Service'. The table contains three rows of data. The first row has ID '136' and 'Crisis Stabilization', which is highlighted with a red rectangular box. The second row has ID '137' and 'Medication-Assisted Treatment: OTP'. The third row has ID '135' and 'Recovery Housing'.

ID		Primary Service
136	Crisis Stabilization	
137	Medication-Assisted Treatment: OTP	
135	Recovery Housing	

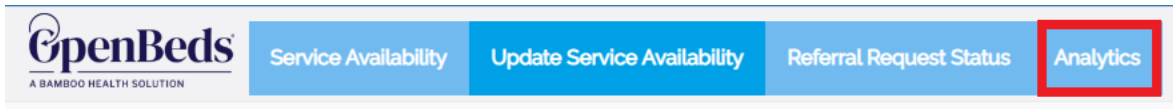
4. Select 'Deactivate Service'

A screenshot of the 'Manage Receiving Service Details' page. The page title is 'Manage Receiving Service Details'. Below the title, it says 'Primary Service: Crisis Stabilization'. On the right side of the page, there is a blue button with the text 'Deactivate Service', which is highlighted with a red rectangular box.

Using Analytics

Pulling reports for your organization

1. Log into OpenBeds with your credentials
2. Navigate to Analytics



3. Select a Reporting time-period; this period cannot exceed 150-day span
4. Select a Service Type
5. Select 'Search'

Analytics

From

Organization Luna Treatment Center

To

Service Type Select Service

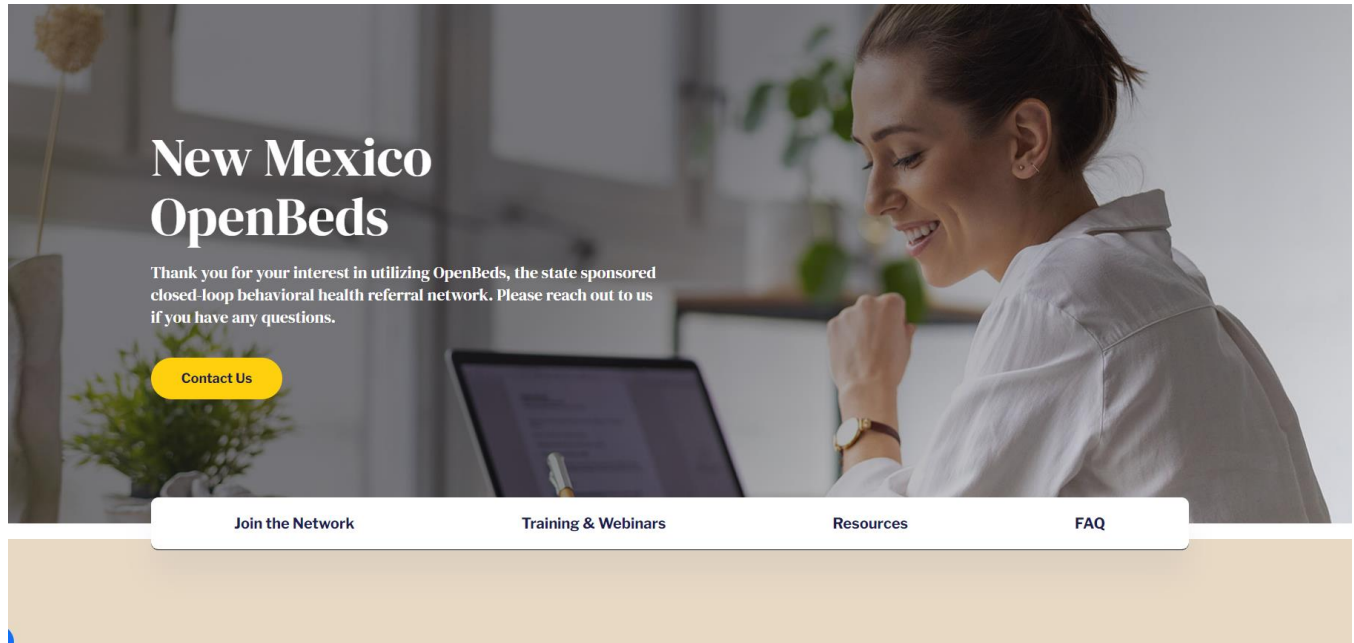
[Search](#)

- Service Availability Statistics
- Referral Requests Received
- Referrals Status
- Service Availability Updates Frequency
- Medical Records Transferred
- Time taken to close or accept referrals
- Messages Exchanged for Referral
- Messages for Local Actions
- Show/No-Show
- Time taken to Show/No-Show
- Summary Of Statistics

OpenBeds Resource Page

This page will serve as your primary source for all OpenBeds information, recorded/upcoming trainings, and other informational resources.

<https://bamboohealth.com/nm-openbeds-onboarding-resources/>

A banner image featuring a woman in a white lab coat smiling while looking at a laptop. The background is a soft-focus office setting with a plant and a vase.

**New Mexico
OpenBeds**

Thank you for your interest in utilizing OpenBeds, the state sponsored closed-loop behavioral health referral network. Please reach out to us if you have any questions.

[Contact Us](#)

[Join the Network](#) [Training & Webinars](#) [Resources](#) [FAQ](#)

OpenBeds Support Center

Please contact Support for all account related issues. This can include but is not limited to login issues, account deactivation, user view errors, etc.

Please submit a ticket to our Help Desk at <https://openbeds.zendesk.com/hc/en-us/> or call (833) 275 – 2045 for all questions and concerns.

If you received the message "Account Has Been Deactivated" upon login, click here for information on a security enhancement impacting users who have not logged in within the last 90 days

Bamboo Health **SUBMIT A TICKET** SIGN IN

Welcome to OpenBeds Support Center

How can we help you?