Bamboo Health

Referring Organization

User Guide: OpenBeds

Bamboo Health

Contents

(Click to Content)

Treatment Availability Dashboard

Overview

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	🗓	🗓	🗓	🗓	🗓	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

1. **Submit Request** – Use green arrow to start a digital referral.

2. **Organization** – The organization name providing the service.

3. **Primary Service** – The service offered at that organization and the availability for that service (beds or appointments).

4. **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.

5. **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).

6. **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.

7. **Last Update** – This timestamp shows the last time an organization updated their availability.

Sending a Digital Referral

Utilizing the search filters

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)

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

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	📇	📇	📇	📇	📇	05-17-2023	🔴	211 social service requests not related with treatment referrals. Please include patient zip code on all direct referrals.	ℹ	10:34 06-22-2023
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→	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.	ℹ	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.	ℹ	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:
[First Name]

Last Name:
[Last Name]

Date Of Birth:
[01-28-2027]

Phone Number:
[Phone Number]

Gender Identity *
[-- Select Gender --]

Age:
[-4]

Address line 1:
[Address line 1]

Address line 2:
[Address line 2]

City:
[City]

State:
[-- Select State--]

Zip Code:
[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

Checking Referral Request Status Queue

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):
   a. The status of your referral will be presented in the *Status* column
   b. To only view open referrals, you can filter by a status of *No Disposition*

Utilizing Messaging Feature

Once a referral is sent, referring and receiving facilities can message back and forth regarding the individual request.

1. Navigate to the Referral Request Status tab
2. Click the blue messaging arrow to message the facility about that individual request

3. External messaging
   a. In the *Send Message* box in the left column, you can message the facility who sent you the referral to ask additional questions, request documentation, follow up, etc.
      i. You can add files to a message by clicking "Choose Files" below the message.
   b. When done, hit Send.
   c. All previous messages/activity will live in the top ribbon of the referral request.

Time/Date	Name	Role	Activity	Action/Message	Attachment
2022-04-15 09:41:22	Haley Referring	Referring Administrator	Opened	Hi	

Showing 1 to 1 of 1 entries

Previous 1 Next

External Resources

RoundTrip Transportation

Send Message

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

Choose Files No file chosen

Select below to notify your team members

Select

Send

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

Status ● Opened ○ Closed ☐ Accepted ☐ Declined

1. Internal messaging
   a. In the *Local Action* box in the right column, you can message internally with people at your organization
      i. You can ask questions around internal processes, ask someone to pick up a request if you're going off shift, etc.
      ii. You can tag an individual at your organization that you want the message to go to
   b. When done, hit send.
   c. All previous messages/activity will live in the top ribbon of the referral request.

Time/Date	Name	Role	Activity	Action/Message	Attachment
2022-04-15 09:41:22	Haley Referring	Referring Administrator	Opened	Hi	

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Send

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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

Status ● Opened ○ Closed ☐ Accepted ☐ Declined

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.
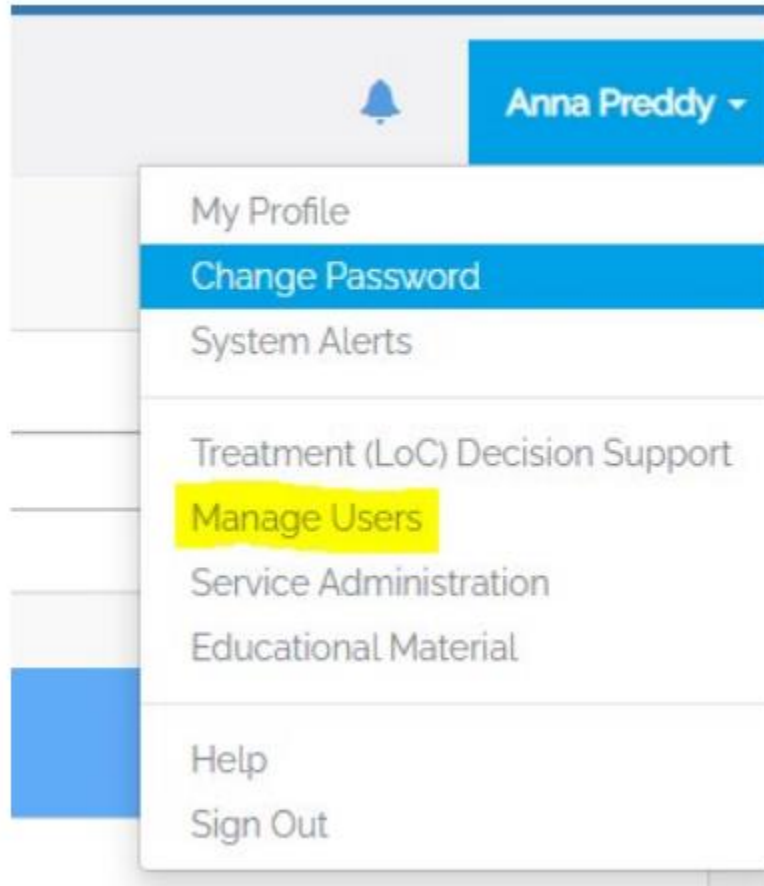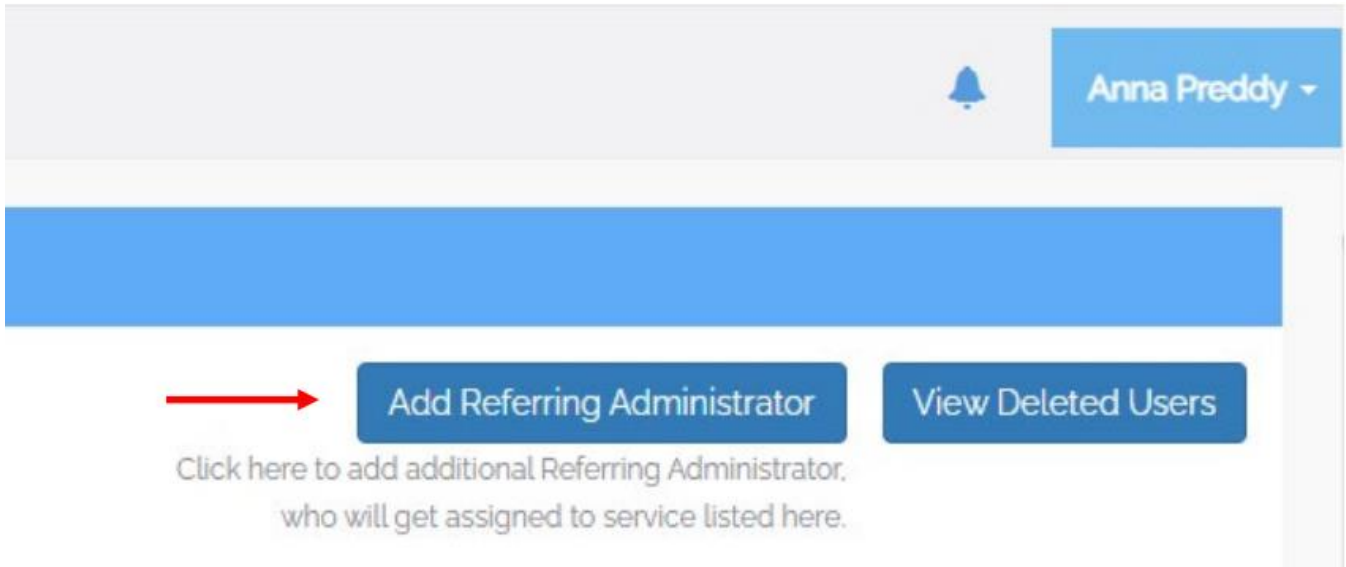
Manage Users for the Organization

Create Users:

Referring Administrators

1. Log into OpenBeds with your credentials
2. Navigate to your service selection dropdown at the top right side of the screen
   a.   Select 'Manage Users'

3. Select 'Add Referring Administrator'

4. An 'Add Referring Administrator' form should populate. Please fill out all the necessary files.

5. Select 'Submit'
6. Direct your created Referring Administrator to login and have them reset their password to gain access.

Referring Provider
1. Log into OpenBeds with your credentials
2. Navigate to your service selection dropdown at the top right side of the screen
   a. Select 'Service Administration'
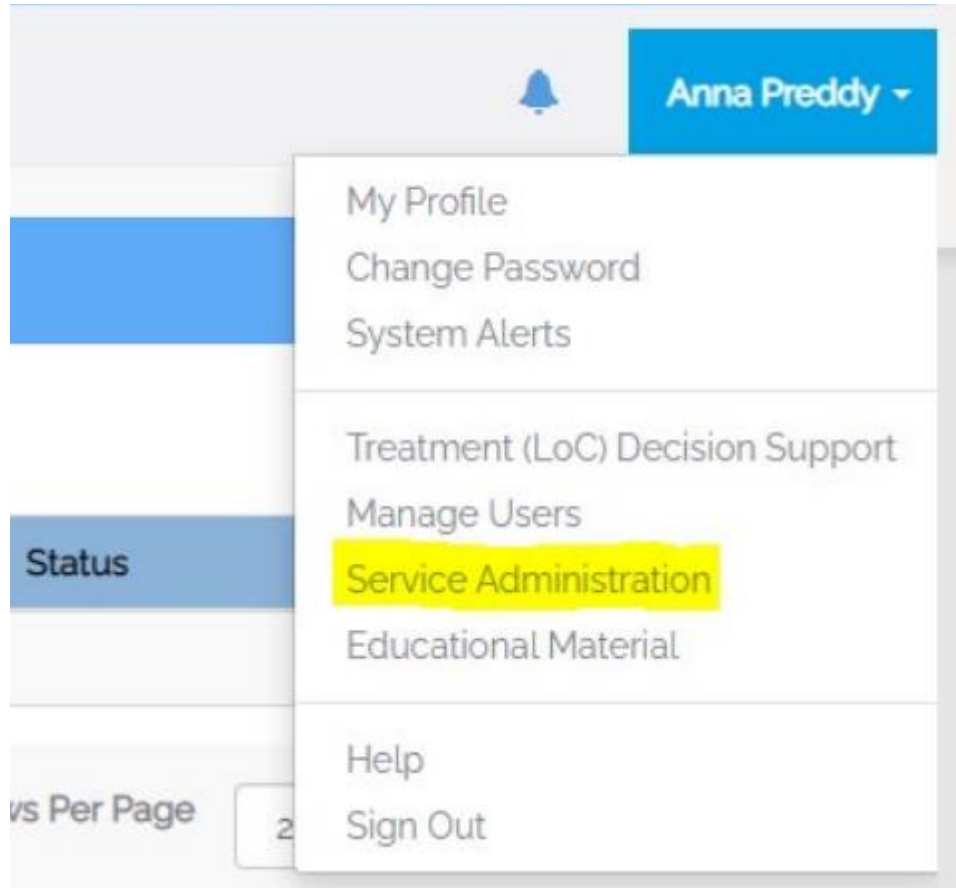
3. Select the service you would like to have the Referring Provider access. You do this simply by clicking the service name.


4. Select 'Add User to the Service' at the bottom of the Add Referring Service Details.

5. Input Referring Provider information. Select 'Submit'
6. Direct your created Referring Provider to login and have them reset their password to gain access.

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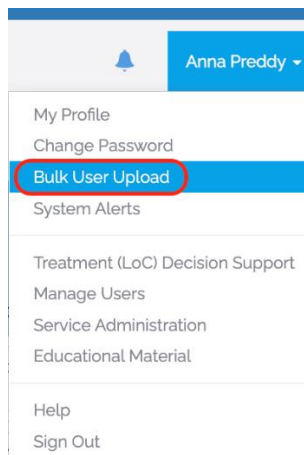
3. Follow and Complete Step 1
4. Follow and Complete Step 2

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.

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
#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

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

Bamboo Health

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
#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

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.

Using Analytics

Pulling reports for your organization

1. Log into OpenBeds with your credentials
2. Navigate to Analytics
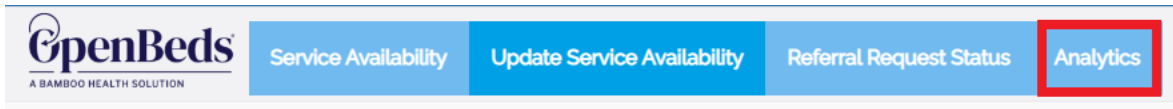
3. Select a Reporting time-period; this period cannot exceed 150-day span
4. Select a Service Type
5. Select 'Search'
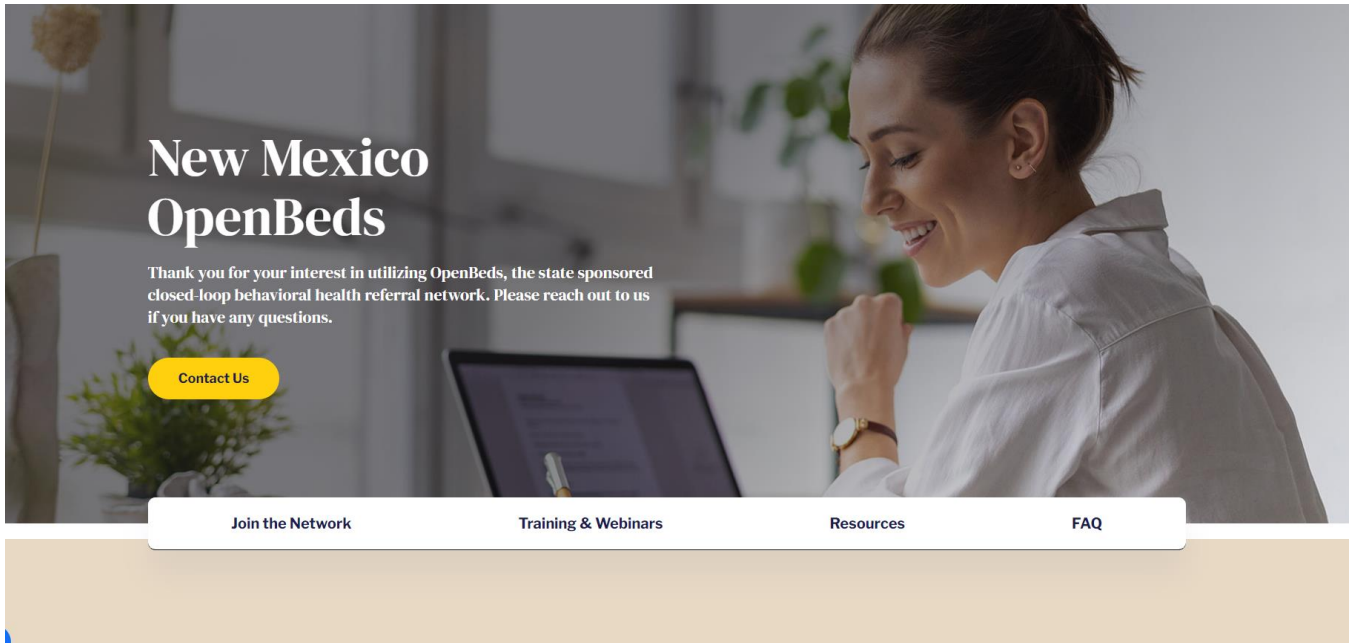
OpenBeds Resource Page

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/

Bamboo Health

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?

🔍 Search