OpenBeds® System of Florida

Provider and Administrator User Guide

Updated December 10th, 2024

Introduction

This user guide details the responsibilities and distinct privileges of the user roles outlined below.

Role	Primary Function(s)	Secondary Function(s)
Receiving Provider	• Update availability of services	
Receiving Administrator	• Manage receiving organization users • Manage receiving service(s) details • Train new staff on OpenBeds usage	• Update availability of services

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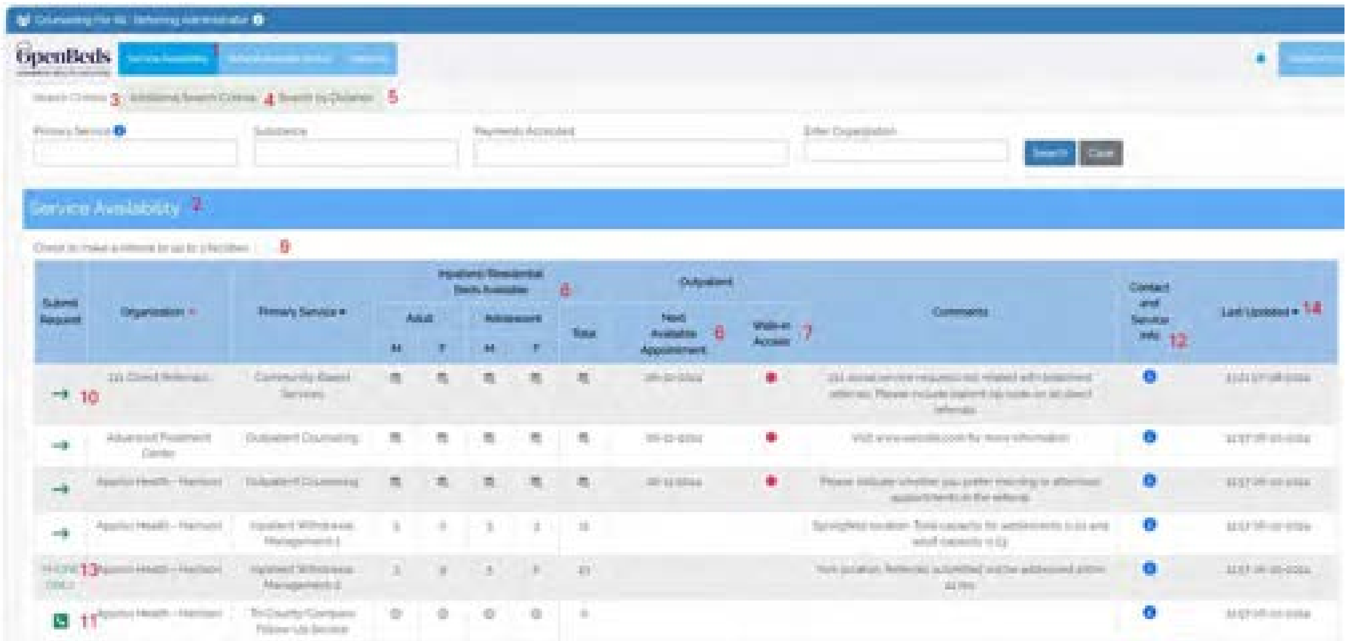
Searching/Updating Availability

Search for Services



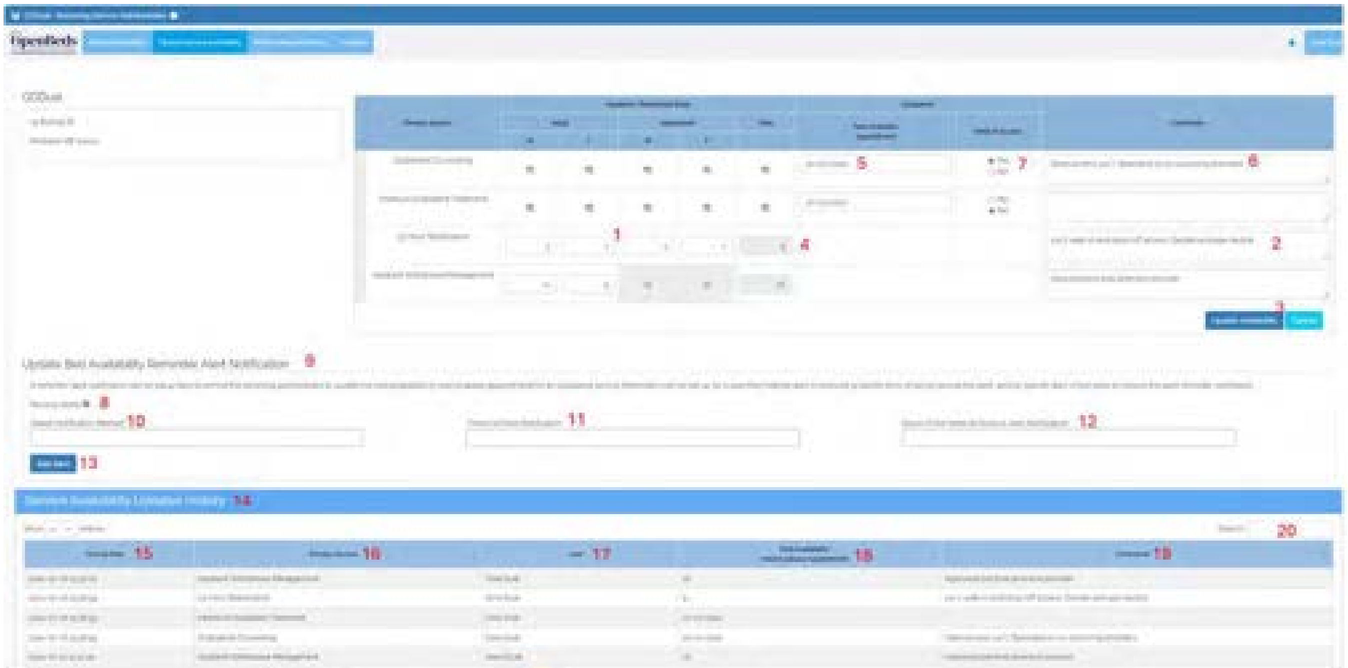
After logging in, to search for the appropriate service and the organization(s) providing it:

1. Click on the ‘Service Availability’ tab (1) which displays all available organizations in alphabetical order, along with additional service and availability details via the Service Availability dashboard (2)
   a. **For Receiving Administrators**: You are automatically defaulted to the ‘Update Service Availability’ tab and will need to navigate to the ‘Service Availability’ tab. See the **Update Service Availability** section below for additional information on updating service availability.
2. Narrow results by filtering according to 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. **Green Phone Only text** (13): 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.

Update Service Availability

Users with the role of Receiving Administrator will be automatically defaulted to the ‘Update Service Availability’ tab 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.

For Receiving Administrators Only

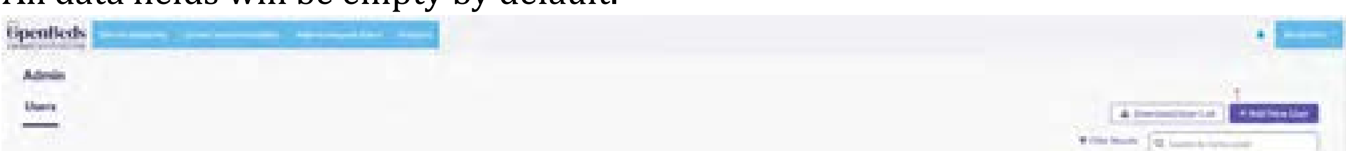
Note: A receiving organization can have one or more services. Similarly, the organization can have multiple Receiving Administrators all of which have access to all of that organization's services.

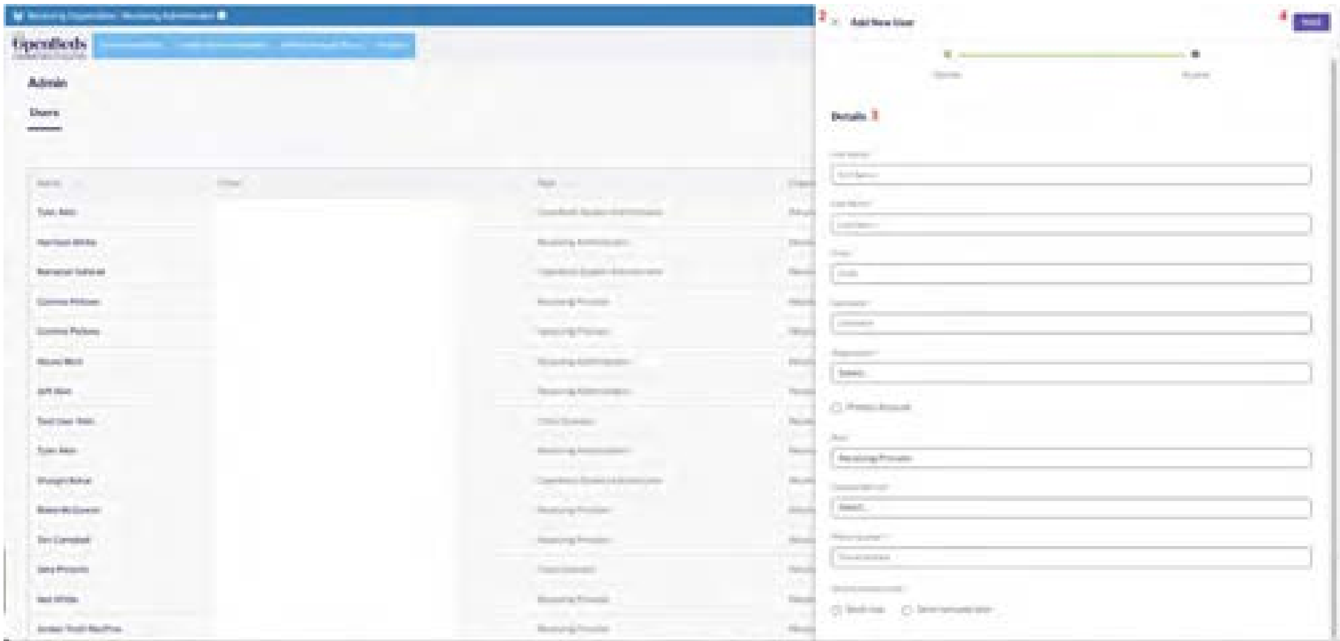
User Management

Create New User Account

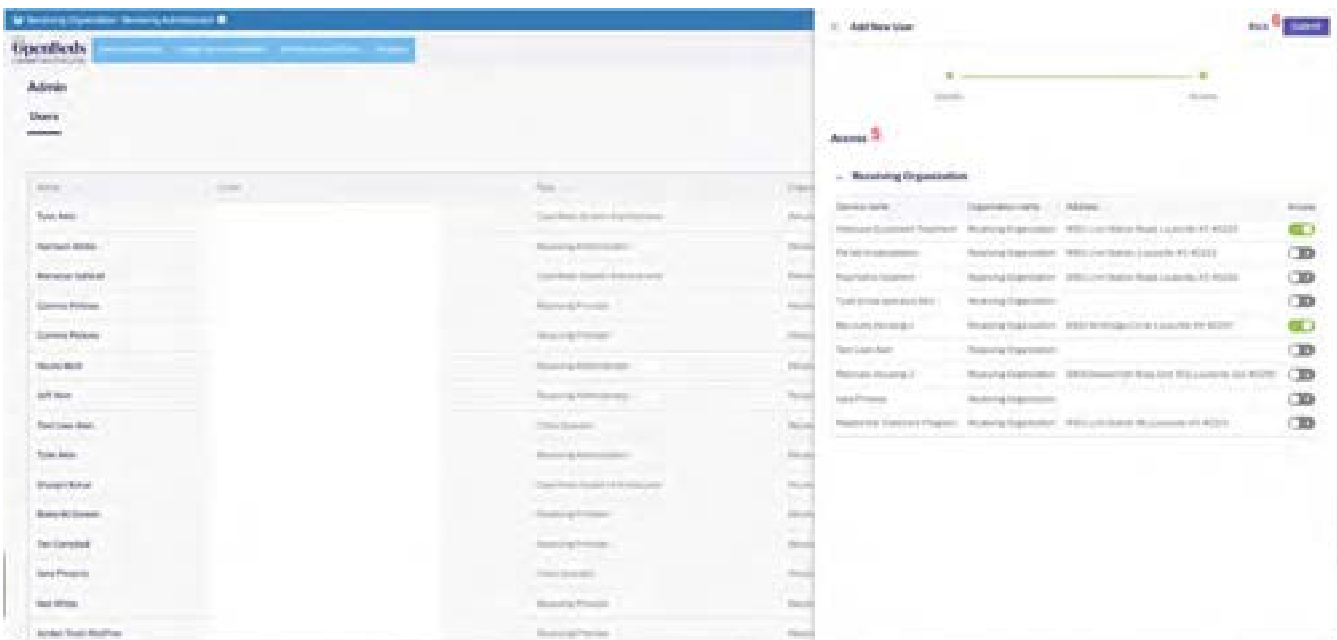
To create a new user, log into OpenBeds, click the drop-down icon beside your name at the top right of the page, and select 'Manage Users'. Note: You can only create new users for the services your Administrator role is attached to.

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.





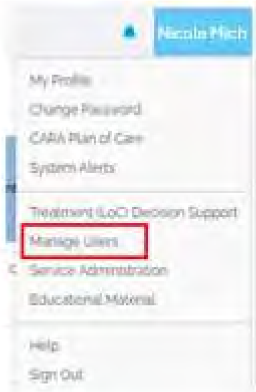
Enter the new user's details (3) and click 'Next' (4) to navigate to the 'Access' tab. Note: The Access tab will not display until you select a role for the new user on the 'Details' tab.



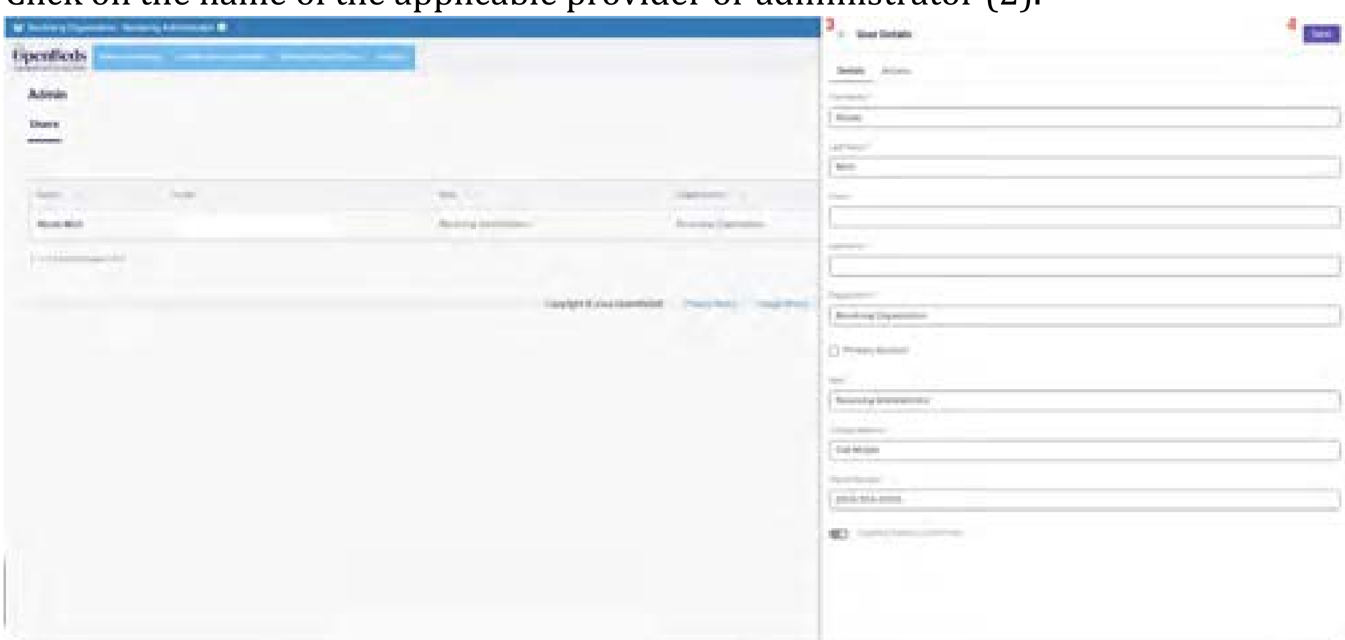
On the Access tab (5), toggle on the services that the new user needs access to. Click 'Save' (6) to add the new user to your organization.

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).



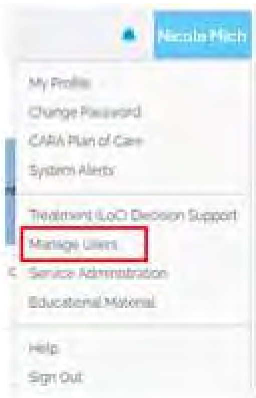
The ‘User Details’ drawer (3) opens for editing. You can change any data field displayed at any time, even if the user’s account has been deactivated. Click ‘Save’ (4) to capture any changes made to the user’s profile.

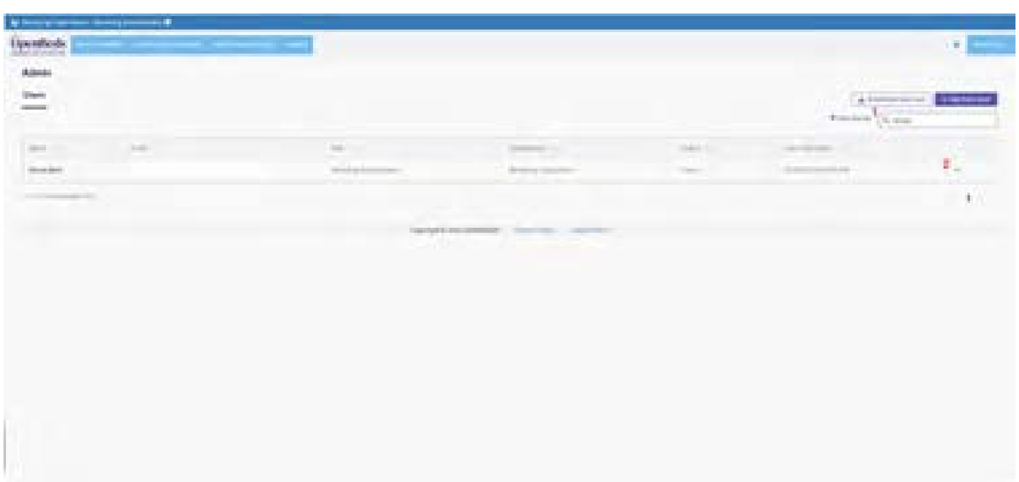
Pending Users

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 Reactivate 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

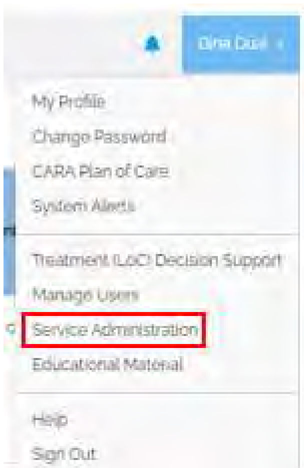
Note: Any accounts deactivated prior to the 90-day automated security deactivation process implemented on January 10, 2024 will not have an associated deactivation method.

Manage Services

Areas Served

To add/remove/edit geographic areas served by a service line,

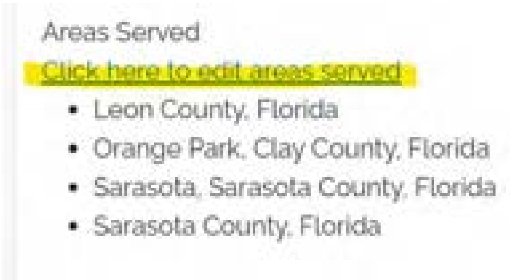
1. Log into OpenBeds using your credentials.
2. Click the drop-down icon beside your name at the top of the page and select 'Service Administration.'



3. Select the name of the service you want to edit.

4. 

5. Scroll down and select “Click here to edit areas served”

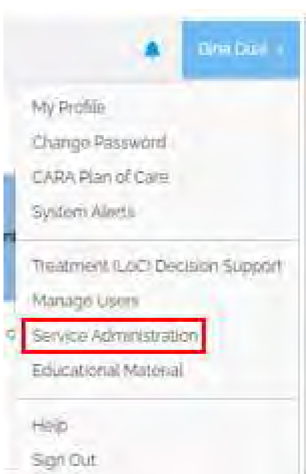


6. Type the name(s) of towns and counties the service operates in, selecting each relevant option that comes up.
7. Click “Save” to confirm changes.

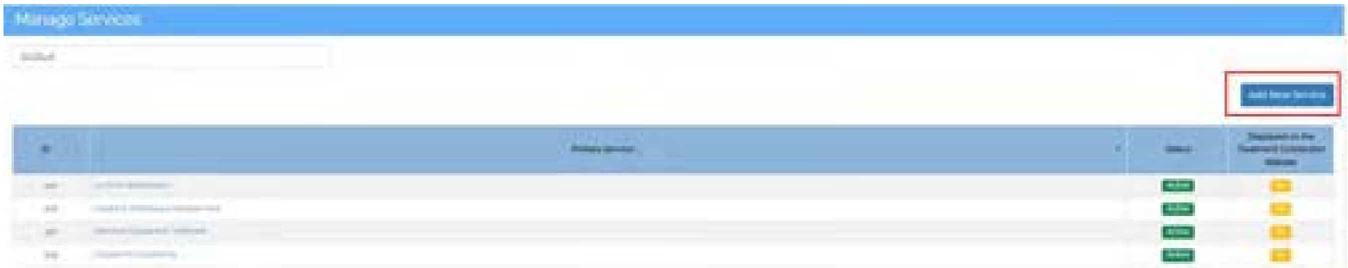
Create a New Service

To create a new service for a receiving organization,

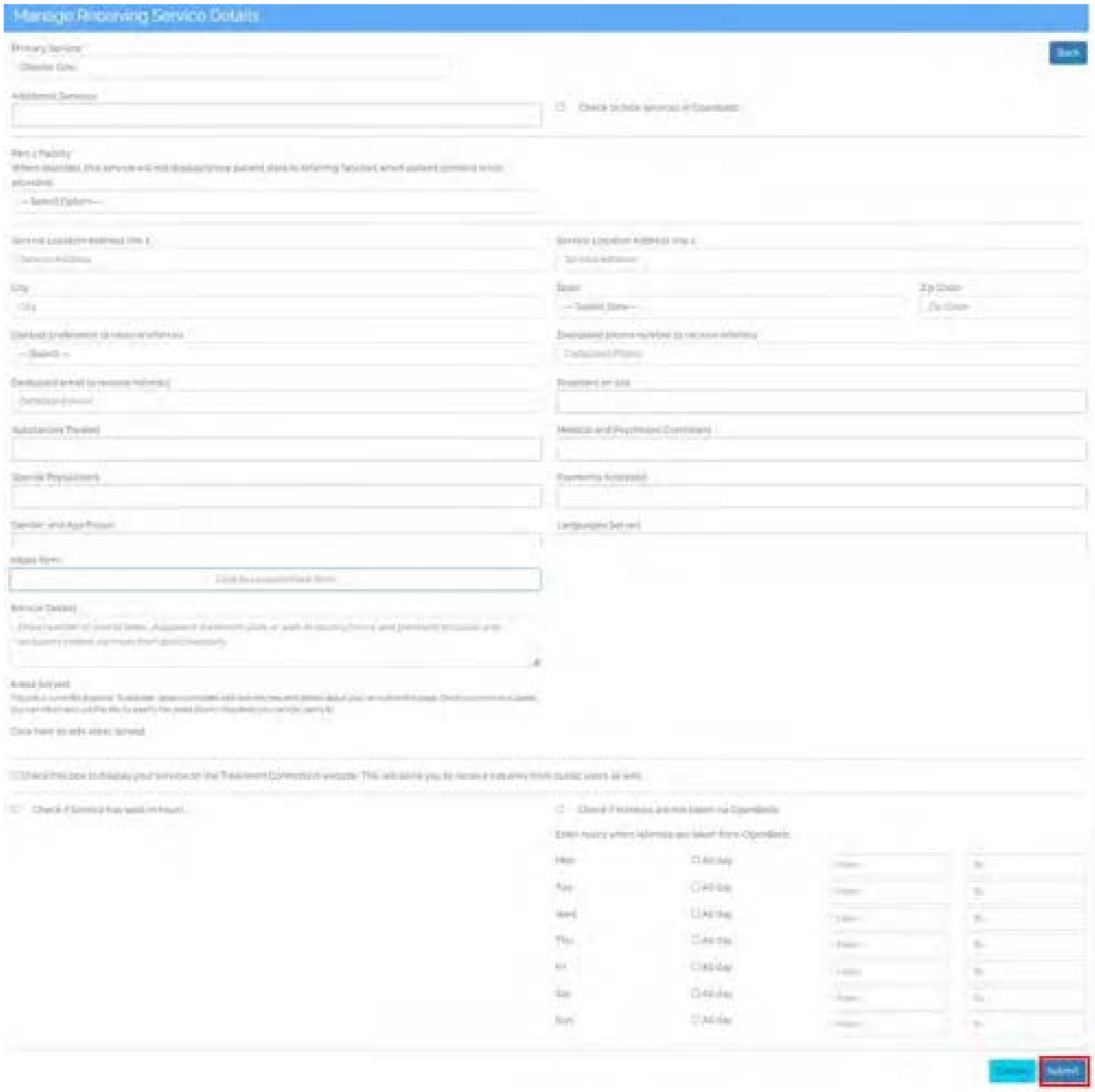
1. Log into OpenBeds using your credentials.
2. Click the drop-down icon beside your name at the top of the page and select ‘Service Administration.’



3. Select ‘Add New Service’ in the top right-hand side of the page.



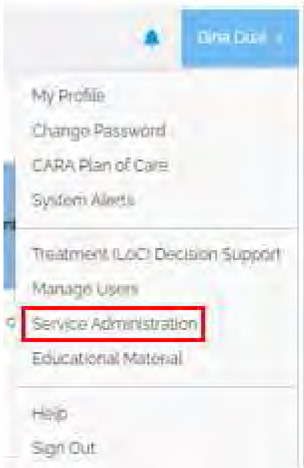
4. Complete the information on the 'Manage Receiving Service Details' page and select 'Submit'.



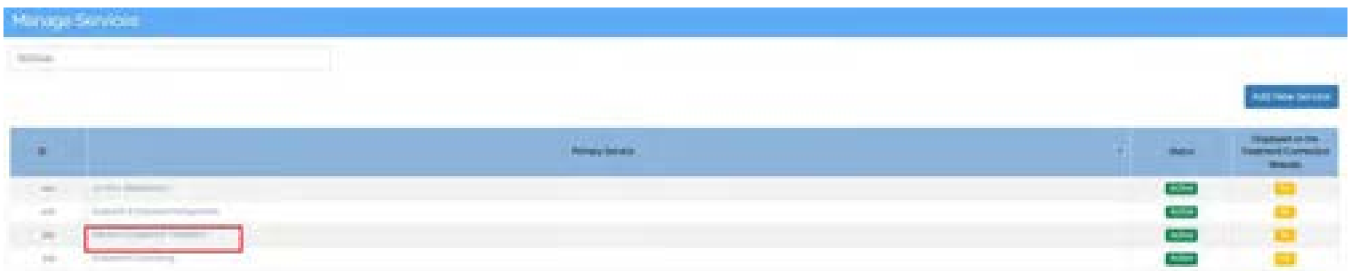
Edit an Existing Service

To make changes to an existing service,

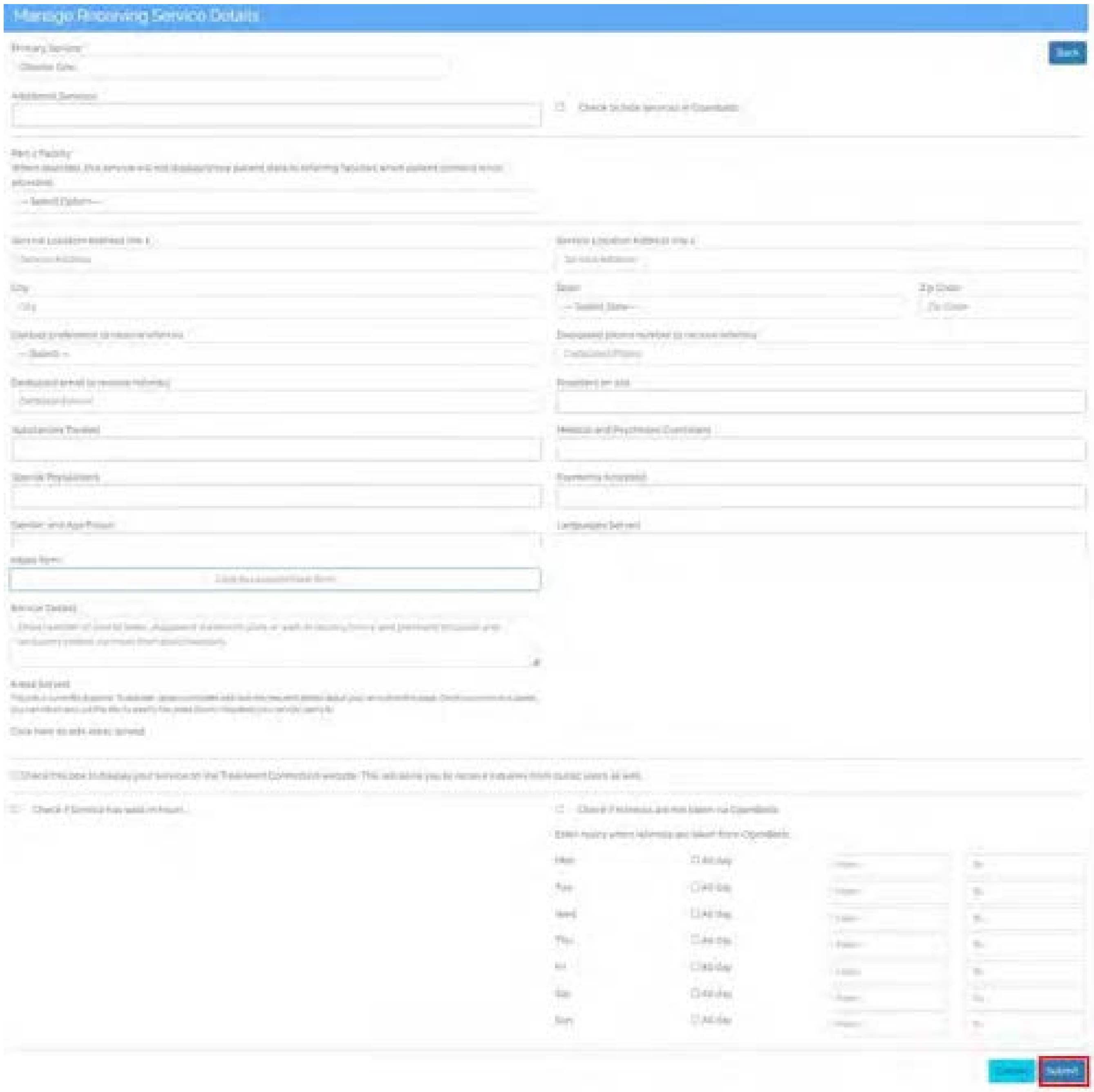
1. Log into OpenBeds using your credentials.
2. Click the drop-down icon beside your name at the top of the page and select 'Service Administration'.



3. Select the name of the service you want to edit.



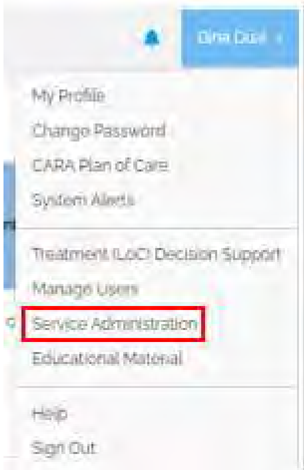
4. Make the desired changes on the 'Manage Receiving Services Details' page and select 'Submit' to save your edits.



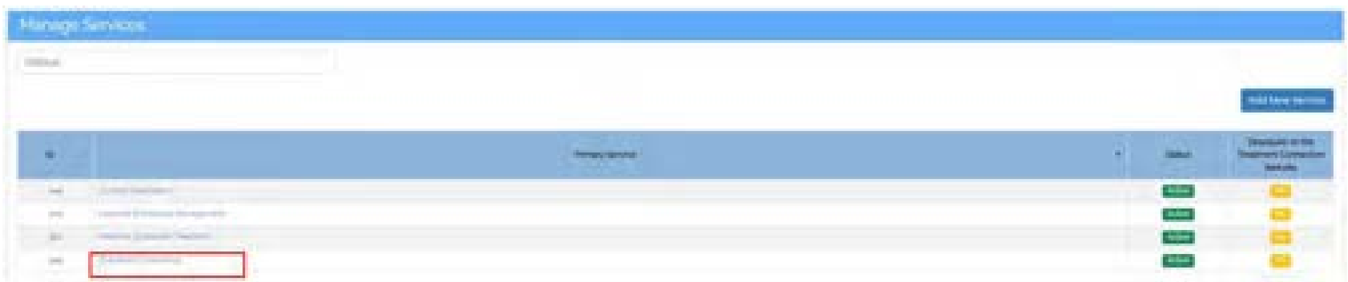
Deactivate a Service

To deactivate a service,

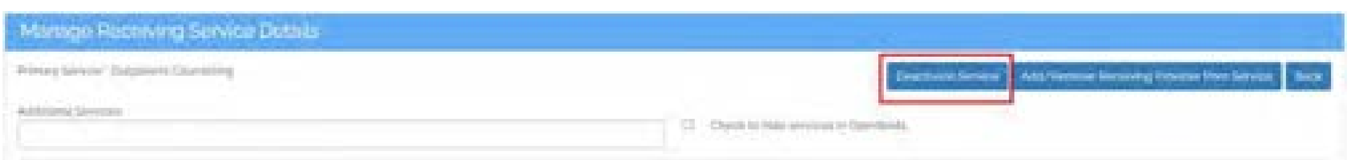
1. Log into OpenBeds using your credentials.
2. Click the drop-down icon beside your name at the top of the page and select ‘Service Administration’.



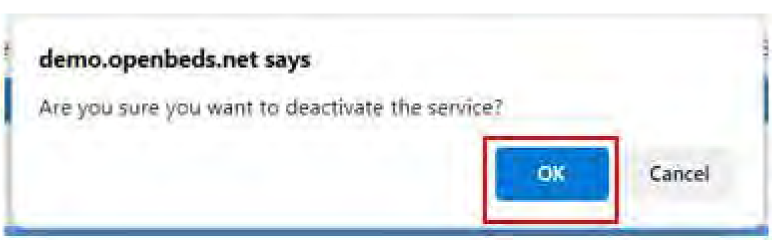
3. Select the name of the service you want to deactivate from the 'Manage Services' page.



4. Select 'Deactivate Service' on the 'Manage Receiving Services Details' page.



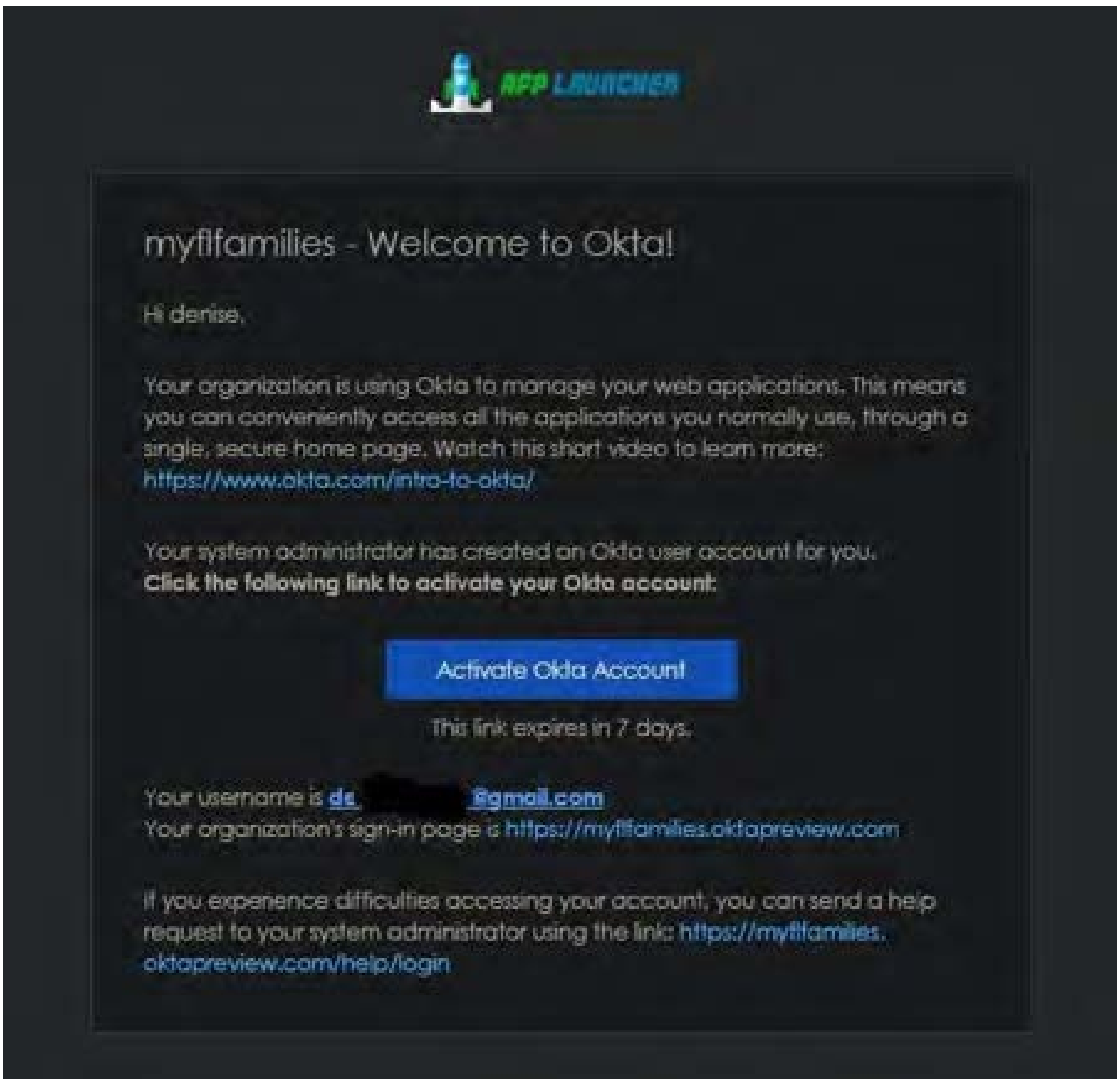
5. You'll receive a pop-up alert 'Are you sure you want to deactivate the service?' Click 'Ok' to remove this service from your organization.



Logging In

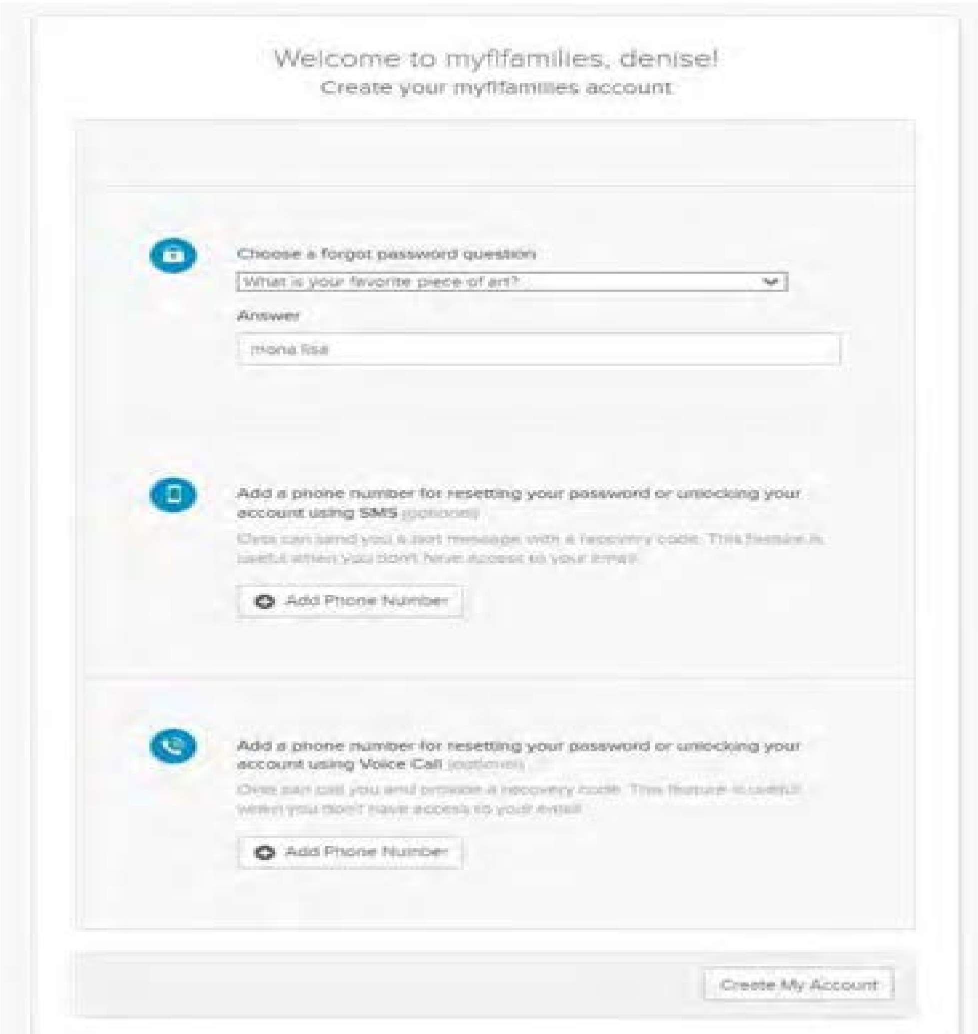
Identity Management User Guide

When External users(without myflfamiles.com) are added to Okta as Universal Accounts ,User's get the activation email from Okta which contains Link to activate their Profile on Okta .



If a user is activating for the first time they will be prompted to set up their account and set up their MFA factor which is a mandatory for the user's .

Note the security question is case sensitive and must be at least 4 characters. These are the mandatory requirement that user should complete before completing the profile .

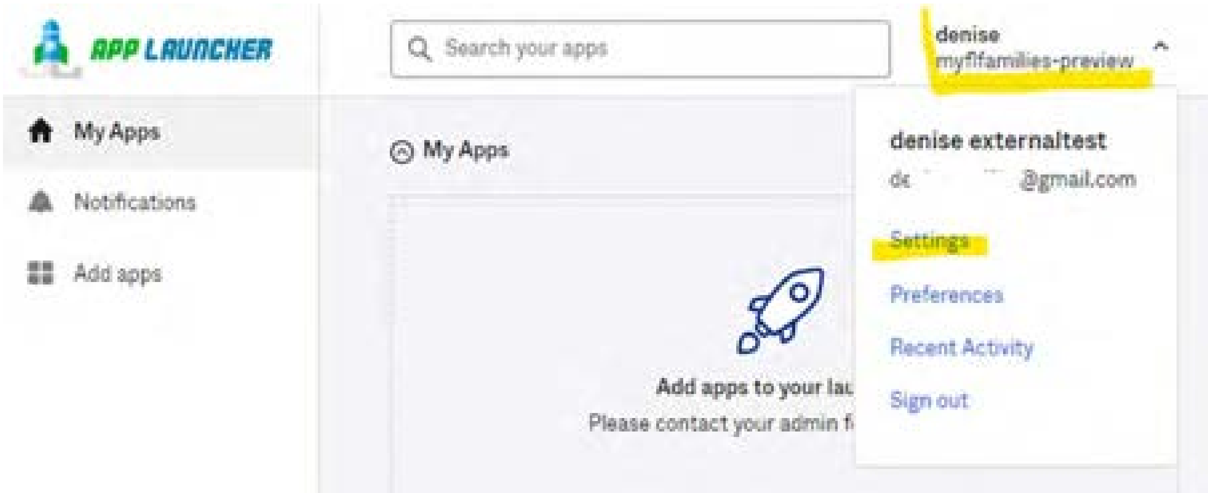


We advise that users set up a SMS or Voice Call for password recovery/unlocking their account.

You can use the same number for both Voice call or SMS factor enrollment which can be used while resetting the password

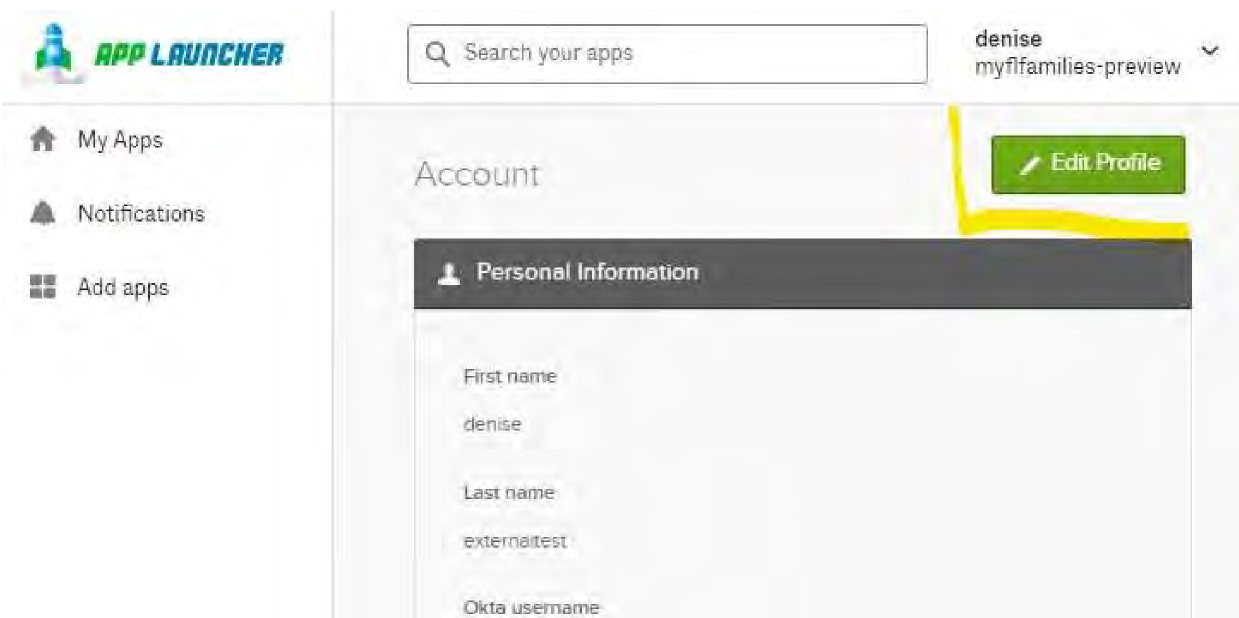
Once user completes the previous steps they get directed to the App Launcher Dashboard.

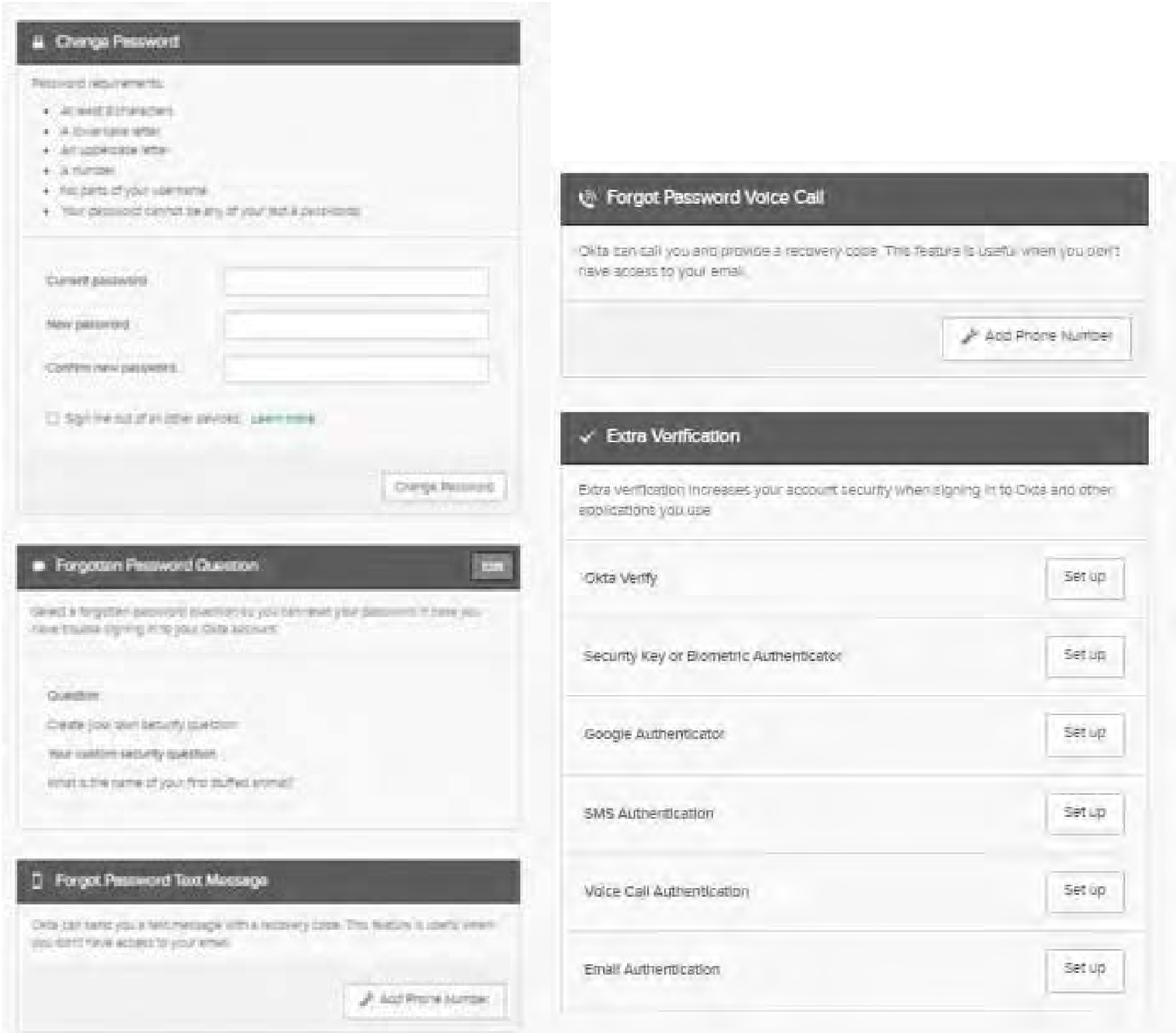
User can update their passwords , MFA , Security Question under user settings on the top left of the dashboard page .



They will receive a prompt to verify their password after clicking the Edit Profile link.

- In their Profile, they can Reset their password, set a new Forgotten Password Question, Set a Forgotten Password Text Message and/or Voice Call and set up “Extra Verification”/MFA





- We suggest users configure either Forgot Password Text Message or Voice Call and TWO Extra Verification/MFA Factors (i.e. SMS and Email* or Google Authenticator) that are used to access applications containing sensitive data. MFA is an extra layer that protects our data by verifying that the account belongs to the person authenticating
- Please note that when selecting Email Authentication, the Verification code will ONLY go to the primary email address on the Okta Account (typically the user's work email address provided to the Okta Administration Team during onboarding).

Okta SSO Questions

DCF has a dedicated inbox for questions about Okta accounts. If you need assistance with your Okta account, please reach out to: openbeds@myflfamilies.com

