



OpenBeds® Crisis Management System

Referring Provider User Guide – Consolidated Referral View

Created 10/30/24

Introduction

This user guide details the responsibilities and distinct privileges of the Referring 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

Counseling For All: Referring Administrator

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Service Availability | Referral Request Status | Analytics

Search Criteria **3** | Additional Search Criteria **4** | Search by Distance **5**

Primary Service **1** | Substance | Payments Accepted | Enter Organization | Search | Clear

Service Availability **2**

Check to make a referral to up to 3 facilities: ☐ **9**

Submit Request	Organization	Primary Service	Inpatient/Residential Beds Available 8					Outpatient		Comments	Contact and Service Info 12	Last Updated 14	
			Adult		Adolescent		Total	Next Available Appointment 6	Walk-in Access 7				
			M	F	M	F							
→ 10	211 (Direct Referrals)	Community-Based Services							06-10-2024		211 social service requests not related with treatment referrals. Please include patient zip code on all direct referrals....		13:21 07-08-2024
→	Advanced Treatment Center	Outpatient Counseling							06-12-2024		Visit www.website.com for more information		12:57 06-10-2024
→	Appriss Health - Harrison	Outpatient Counseling							06-11-2024		Please indicate whether you prefer morning or afternoon appointments in the referral.		12:57 06-10-2024
→	Appriss Health - Harrison	Inpatient Withdrawal Management-1	5	0	3	3	11				Springfield location. Total capacity for adolescents is 20 and adult capacity is 23.		12:57 06-10-2024
PHONE ONLY 13	Appriss Health - Harrison	Inpatient Withdrawal Management-2	3	9	5	6	23				York location. Referrals submitted will be addressed within 24 hrs.		12:57 06-10-2024
📞 11	Appriss Health - Harrison	Tri-County/Compass Follow-Up Service					0						12:57 06-10-2024

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 and Manage a Referral Request

Monitor a Referral Request

To monitor the status of your referral request,

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Service Availability Referral Request Status Analytics

GGDemo Org

Referral Request Status 2

Active Archived

Last Name or ID 6 Referred By 7 Status 8 Show/No Show 9

Follow Up Referrals
☐ View referrals that were accepted, but need a follow up 10

Reset Apply

Showing 1 to 9 of 9 results

Rows Per Page 25

Archive Selected Request

Select	Time/Date 3	Referring Contact Info	Receiving Contact Info	Request Details	Receiving Service 5	Status 14 ID 14	Patient Info 4	Messaging
<input type="checkbox"/>	Requested 15:07 07-22-2024 New Message 15:59 07-22-2024 11	GGDemo Org Outpatient Treatment Facility, Counseling For All gg@bam-ogdemoorg@bamboohealth.com Referrer Notified by E-Mail	Counseling Work 23-Hour Stabilization 9901 Linn Station Road, Suite 500 Louisville, KY 40223 gg@bam-ohstog@bamboohealth.com 502 111-1111 Provider Notified by Service E-Mail	test referral	23-Hour Stabilization	Opened 3628 Accepted Elsewhere 16	3628 Ina Test	→ 13
<input type="checkbox"/>	Requested 15:07 07-22-2024 New Message 15:59 07-22-2024 12	GGDemo Org Outpatient Treatment Facility, Counseling For All gg@bam-ogdemoorg@bamboohealth.com Referrer Notified by E-Mail	GGDual 23-Hour Stabilization 9901 Linn Station Road, Suite 500 Louisville, KY 40223 gg@bam-duatog@bamboohealth.com 502 111-1111 Provider Notified by Service E-Mail	test referral	23-Hour Stabilization	Accepted and Closed 15 Show 17	3627 Ina Test	→
<input type="checkbox"/>	Requested 13:44 07-22-2024 New Message 14:59 07-22-2024 18	GGDemo Org Outpatient Treatment Facility, Counseling For All gg@bam-ogdemoorg@bamboohealth.com Referrer Notified by E-Mail	Counseling Work 23-Hour Stabilization 9901 Linn Station Road, Suite 500 Louisville, KY 40223 gg@bam-ohstog@bamboohealth.com 502 111-1111 Provider Notified by Service E-Mail	test referral	23-Hour Stabilization	Accepted and Closed Show	3624 Test Referral	→

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).

Manage a Referral Request

You can communicate with the receiving organization regarding a referral 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.

The screenshot displays the OpenBeds Referral Request Status dashboard on the left and a 'Referral' drawer on the right. The drawer is divided into three tabs: Request, Attachments, and Log. The 'Request' tab is active, showing a form for a referral request for Kim Smith. The form includes fields for Patient (Kim Smith), Referring contact (Tree Healthcare), Date requested (02/02/2023 08:34), Urgency of need (Imminent risk of harm to self or others, or gravely disabled decision making), Request ID (3567), and various checkboxes for Referral (Voluntary), Substances treated (Alcohol, Benzodiazepines, Cannabis, Dextromethorphan, Hallucinogens, Heroin, Inhalants, Methamphetamine, Other Opioids, PCP, Stimulants, Tobacco), Medical and psychiatric conditions, Special populations, Payment options (Self-pay, Sliding fee scale, Medicaid-Highmark, Medicare, Private health insurances, Federal military insurance, No insurance, Medicaid-AmeriHealth, Traditional Medicaid, Test Payment), Notifications, and Services requested (Transportation). The drawer also shows a messaging interface with a 'Send' button and a list of messages. The messages include a 'Received and reviewing' status, a message from 'Kim-smith.pdf' and 'Kim-smith.doc', and a message from 'Suicide Attempt, patient is medically cleared. CM-Talawanda Downs (302) 000-0000'.

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. [See the other tabs sections for additional information on the 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 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'. 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

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.

Referral Request Status

Active | Archived

Last Name or Request ID: Organization:

Follow Up Referrals
☐ View referrals that were accepted, but need a follow up.

Showing 1 to 25 of 2113 results

Archive Selected Request | Delete Selected Request

Select	Time/Date	Referring Contact
<input type="checkbox"/>	Requested 18:24 02-20-2024	DERefCjb Administrator Psychiatric Inpatient - & DERef openbedstraining-deref@bambooh... 1857 555-5555 Referral notified by E-Mail
<input type="checkbox"/>	Requested 18:24 02-20-2024	DERefCjb Administrator Justice System, DERef openbedstraining-deref@bambooh...

Corinne Fellows

Referral sent

Progress | Request | **Attachments** | Log

Attachment	Uploaded by	Sent to	Date created
Filename01.pdf	Tree Healthcare	Sunshine Hospital	02/02/2023 10:00
Filename02.jpg	Tree Healthcare	Evergreen Health	02/02/2023 10:02
Filename03.pdf	Sunshine Hospital	Tree Healthcare	02/02/2023 10:05
Filename04.jpg	Sunshine Hospital	Tree Healthcare	02/02/2023 10:02

Referring contact info
 Tree Healthcare | Psychiatric Inpatient | (302) 328-3330
 100 Hello way, Springfield, MO 19720

External | Internal

Add a message here

Send

Thu, 05/05/2022

Received and reviewing.

This is a high profile case and to respect the patient wishes, can you please send to Sunshine? Please call me at (302) 000-0000 for additional context.

Just uploaded the documents.

Kim-smith.docx | Kim-smith.pdf

Hello, Could you attach the screening documents? Thank!

Suicide Attempt, patient is medically cleared. CM Tabawanda Downs (302) 000-0000

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

Referral

Request | Attachments | **Log**

1	Florence Lynn, Sunshine Hospital	Closed the referral on 05/15/2022 at 18:00
2	Florence Lynn, Sunshine Hospital	Patient consent was obtained on 05/15/2022 at 18:00
3	Florence Lynn, Sunshine Hospital	Patient showed on 01/15/2022 at 18:00
4	Kim-Smith.pdf	was auto-deleted on 01/14/2022 at 13:30
5	Florence Lynn, Sunshine Hospital	Accepted the referral on 05/14/2022 at 11:00
6	Florence Lynn, Sunshine Hospital	Viewed the referral on 01/13/2022 at 09:00

Referring contact info
 Tree Healthcare | Psychiatric Inpatient | (302) 328-3330
 100 Hello way, Springfield, MO 19720

External | Internal

Add a message here

Send

Thu, 05/05/2022

Received and reviewing.

This is a high profile case and to respect the patient wishes, can you please send to Sunshine? Please call me at (302) 000-0000 for additional context.

Just uploaded the documents.

Kim-smith.docx | Kim-smith.pdf

Hello, Could you attach the screening documents? Thank!

Suicide Attempt, patient is medically cleared. CM Tabawanda Downs (302) 000-0000

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	10/30/24	Revised user guide based on consolidated referral view