



BEHAVIORAL
HEALTHCARE
PROVIDERS

Care Connect User Manual

**ROLE: Providers and
Administrative Assistants**

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Care Connect Application Terms

PROVIDER PROFILE – Used to receive proper referrals from the SchedulR application.

PATIENT PROFILE – Patient demographics and insurance information.

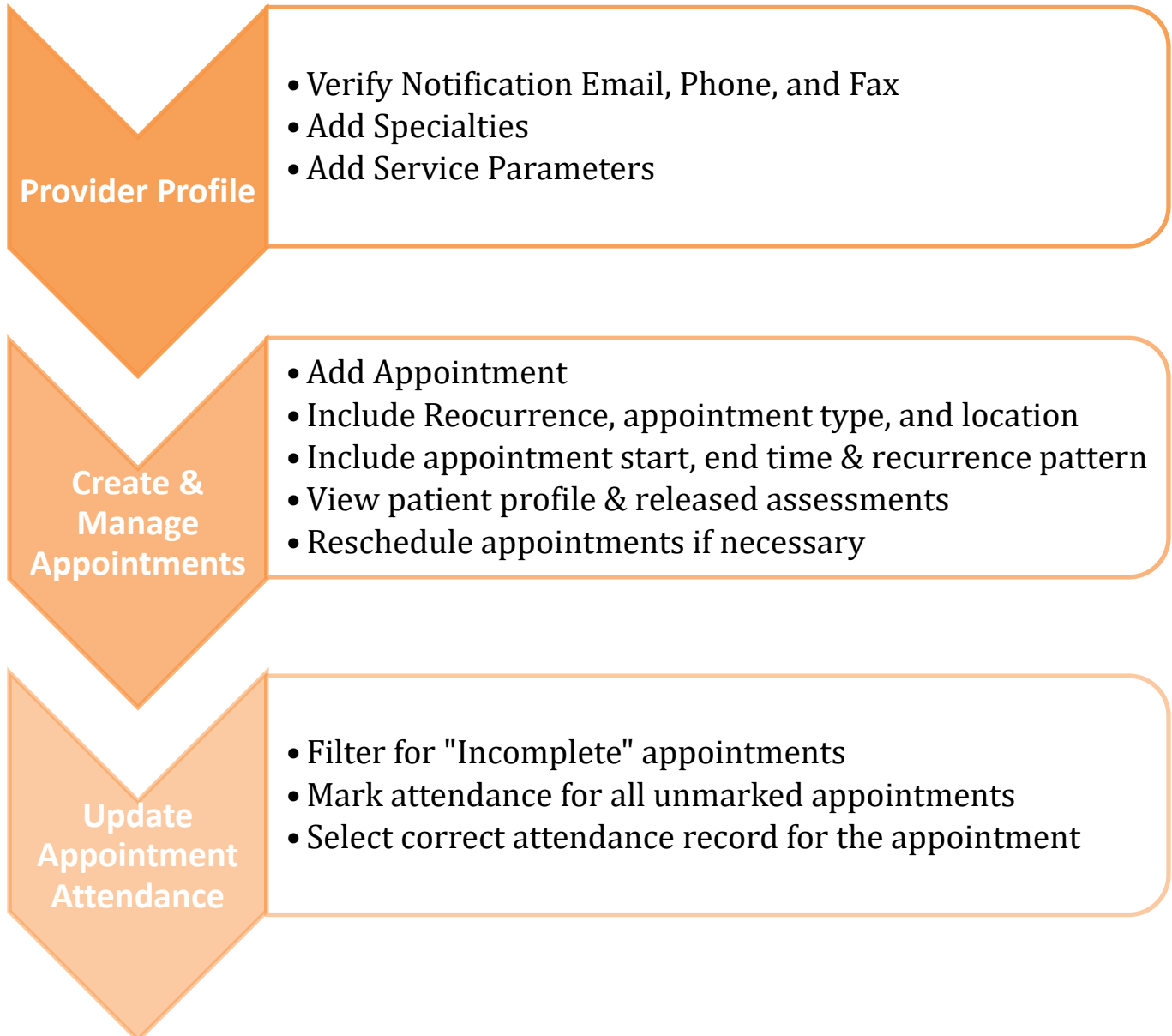
ASSESSMENT - A crisis behavioral assessment completed by a DEC Assessor.

NOTES – Additional information, which may be useful for scheduling an appointment, or for a newly scheduled patient.

DASHBOARD - Displays a quick summary of complete and incomplete work at your logged in site.

[?] TOOL TIP - An icon that provides additional information about a field or button.

Workflow



Logging In & Account Reset

Initial Login

You will receive an email from onlinecare@bhpnnet.com that will include a link to log into Care Connect. If you did not receive an email in your Inbox, please check your spam or junk mail folders to ensure it was not blocked. Select the link and follow the instructions.

Email Example:

Hello,

Your Care Connect application account has been created. Please use this link ([Care Connect](#)) to set your password.

If you have questions about this notice, please contact us at webapps@bhpnnet.com.

Thank you for working with us!



BEHAVIORAL
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*****NOTIFICATION ONLY - PLEASE DO NOT REPLY TO THIS EMAIL*****

After selecting the link in the email from OnlineCare, you will be brought to this screen:

Personal Information		End User License Agreement
Name	Upgrade Test	<input type="checkbox"/> I have read and agree to the End User License Agreement
Login Email	<input type="text"/>	Password
* Notification Email	<input type="text"/>	<input type="text"/>
Default Role	Choose default role ▼	Confirm Password <input type="text"/>
* Phone Number	<input type="text"/>	
Fax Number	(763) 210-4671	
Providers Only		
* Do You Treat Males?	<input type="radio"/> Yes <input type="radio"/> No	
* Do You Treat Females?	<input type="radio"/> Yes <input type="radio"/> No	
* Insurance Accepted	<input type="checkbox"/> Aetna <input type="checkbox"/> Blue Cross And Blue Shield	
	<input type="checkbox"/> HealthPartners <input type="checkbox"/> Medical Assistance	
	<input type="checkbox"/> PreferredOne <input type="checkbox"/> UCare	
* Specialties	<input type="text"/>	
* Are You Accepting New Patients?	<input type="radio"/> Yes <input type="radio"/> No	

Be sure to complete all fields marked with a red asterisk.

Passwords must contain the following criteria:

- Minimum of 6 characters
- Upper case letter
- Lower case letter
- Special character (i.e.; \$, *, &)
- Number

To Enter your specialties of practice, click on the blue box labeled as such:

Specialties

A screen will appear with a list of specialties. Click on the specialties that apply to your practice. Use the scroll bar on the right-hand side to see the complete list of options. Click “Ok” when finished selecting.

Specialties

<input type="checkbox"/> Abortion Recovery	<input type="checkbox"/> Abuse & Violence	<input type="checkbox"/> ADHD Evaluations
<input type="checkbox"/> ADHD Therapy	<input type="checkbox"/> Adolescent Issues	<input type="checkbox"/> Adoption Issues
<input type="checkbox"/> Affective Disorders	<input type="checkbox"/> AIDS Issues	<input type="checkbox"/> Alzheimer's
<input type="checkbox"/> American Sign Language	<input type="checkbox"/> Anger Management	<input type="checkbox"/> Anxiety Disorders
<input type="checkbox"/> Asperger's	<input type="checkbox"/> Assault Victim	<input type="checkbox"/> Autism Evaluations
<input type="checkbox"/> Autism Treatment	<input type="checkbox"/> Bariatric Evaluations	<input type="checkbox"/> Behavioral Disorders
<input type="checkbox"/> Biofeedback Therapy*	<input type="checkbox"/> Bipolar	<input type="checkbox"/> Blended Families
<input type="checkbox"/> Borderline Personality Disorder	<input type="checkbox"/> Brain Injury	<input type="checkbox"/> Buprenorphine/Suboxone
<input type="checkbox"/> Bus Line-Within 10 Blocks	<input type="checkbox"/> Bus Line-Within 2 Blocks	<input type="checkbox"/> Career Counseling
<input type="checkbox"/> Caregivers	<input type="checkbox"/> CD Recovery Issues	<input type="checkbox"/> Christian Counseling/Spirituality
<input type="checkbox"/> Chronic Pain/Health Issues	<input type="checkbox"/> Codependency/Adult Children	<input type="checkbox"/> Couples Therapy
<input type="checkbox"/> Court Ordered	<input type="checkbox"/> Crisis Intervention	<input type="checkbox"/> Culturally Sensitive Therapy
<input type="checkbox"/> Culturally Specific Issues	<input type="checkbox"/> Custody Evaluations*	<input type="checkbox"/> DBT Groups*
<input type="checkbox"/> DBT-Individual Therapy*	<input type="checkbox"/> Deaf Hard Of Hearing	<input type="checkbox"/> Dementia

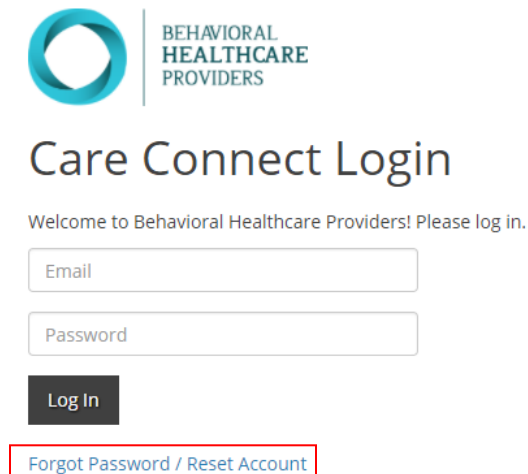
Ok

For specialties marked with an asterisk (*), please submit a copy of your certificate of training to Network Services at nservices@bhpnet.com.

Once you have completed all the fields, click on **Set Up Account**. You will be redirected to the main login page.

Account Reset

If you cannot locate the account activation email, select the “Forgot Password / Reset Account” link on the login page: <https://onlinecare.bhpnet.com>. This link may be used anytime you have locked your account or forgotten your password.

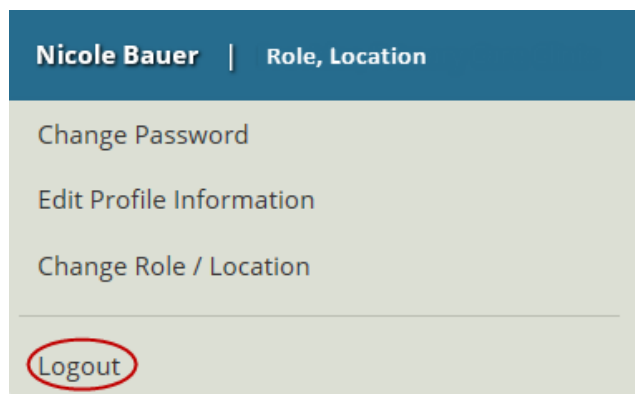


The image shows the 'Care Connect Login' page for Behavioral Healthcare Providers. At the top is the logo, which consists of a teal circular icon and the text 'BEHAVIORAL HEALTHCARE PROVIDERS'. Below the logo is the title 'Care Connect Login'. A welcome message reads: 'Welcome to Behavioral Healthcare Providers! Please log in.' There are two input fields: 'Email' and 'Password'. Below these is a dark grey 'Log In' button. At the bottom, there is a link 'Forgot Password / Reset Account' which is highlighted with a red rectangular border.

If you continue to experience login issues, please contact us as webapps@bhpnet.com.

Logging Out

Care Connect will automatically log you out after 15 minutes of inactivity. You may also choose to logout at any time by selecting the logout option in the drop-down menu under your name, role and logged in location (Personal Account Settings).



The image shows a user profile dropdown menu. The top bar is dark blue and contains the text 'Nicole Bauer | Role, Location'. Below this bar, the menu is light grey and contains three options: 'Change Password', 'Edit Profile Information', and 'Change Role / Location'. At the bottom of the menu, the 'Logout' option is circled with a red oval.

Can I Login as a Different User?

Users should not login using another user's login information, per the User Agreement accepted at time of login to Care Connect. In extension, no staff member will be able to update passwords for another staff member.

However, an administrative staff member will continue to be able to edit profiles and appointments for their associated providers and facilities. Therefore, a provider is not required to login to their account at any point in time if it is agreed that the administrative staff members will manage their profiles and schedule. A provider must be set up in the system but may not necessarily need to login on their own.

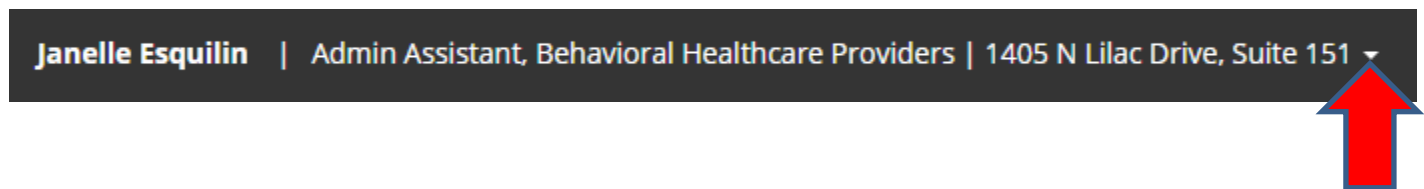
You may reference “[How to Edit a Provider's Profile Information](#)” and “[Appointments](#)” in the table of contents page for more information about how to complete these tasks.

Administrative staff members must request a Systems Access Form (SAF) from Network Services to create their user account. Please email webapps@bhpnet.com for SAF requests.

Viewing/Editing Your Personal Account Settings

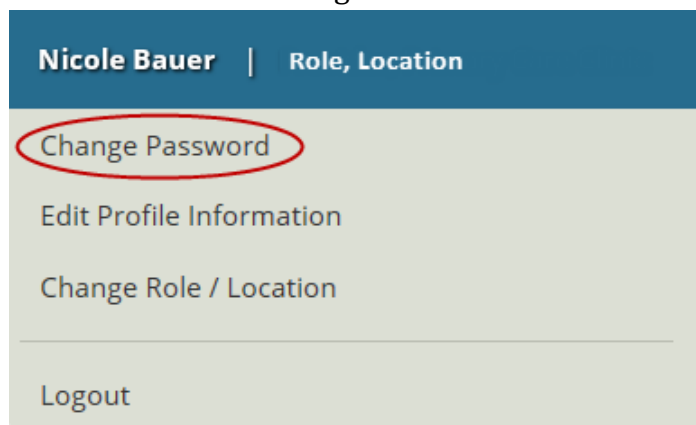
To Access your Personal Account Settings

Your Personal Account Settings are in the drop-down menu under your name, role and logged in location. Click on the downward triangle next to the location address to access your Personal Account Settings.



Changing Your Password

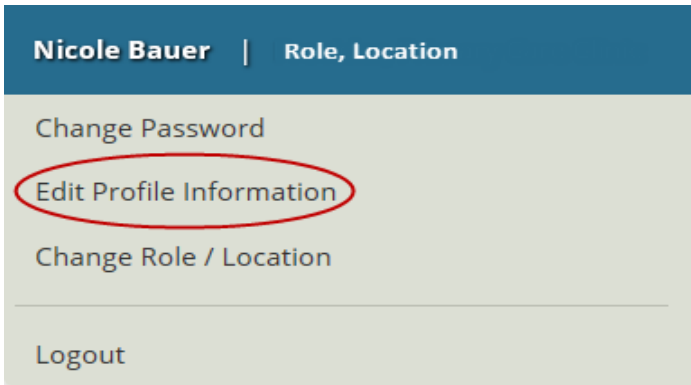
You may change your account password at any time by selecting "Change Password" located in your Personal Account Settings:



You will be directed to the "Reset Password" page.

Editing Your Profile

You may edit your profile information at any time by selecting the link for “Edit Profile Information” located in the drop-down menu under your name, role and logged in location.



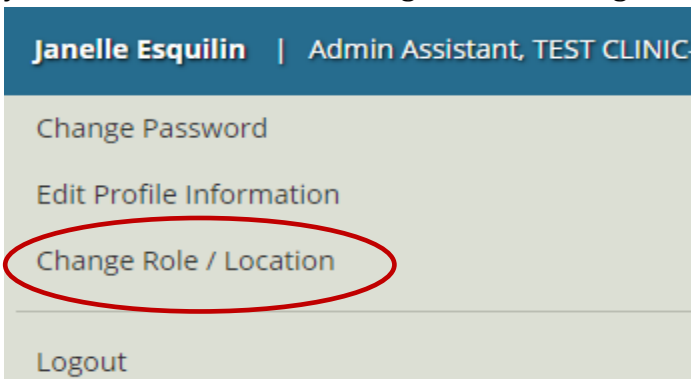
A new window will appear that provides options to update your profile information. You may select the 'x' in the top right corner to close the window and cancel any changes made or select “Save & Close” when your edits are done to save any changes made.

Changing Your Login Location

Practices with multiple practice locations will have a dropdown menu to select from at login.

A screenshot of a form titled "Select Role / Location". It contains three dropdown menus: "Current Role" with "Admin Assistant" selected, "Current Network" with "TEST CLINIC" selected, and "Current Location" with a list of locations. The first location, "TEST CLINIC- Apple Valley | 6950 W 146th St, Suite 100", is highlighted in blue. Other locations include "TEST CLINIC-Minneapolis | 3100 W. Lake Street, Suite 210" and "TEST CLINIC-West St Paul | 1633 S Robert, Suite A". A "Cancel" button is located to the right of the location dropdown.

Admin Assistants will have access to all practice locations, unless otherwise specified. For Admin Assistants to view or edit a specific provider’s profile, Admin Assistants must be logged in to the location that the provider is currently listed under. Providers will only have access to the locations in which they are currently listed as practicing at. Once you have logged in, you may change your location by going to your Personal Account Settings. Select “Change Role / Location”



Dashboard Orientation

The screenshot shows the 'Appointment Management' dashboard. At the top, a dark navigation bar contains a 'Dashboard' link, the user's name 'Janelle Esquilin', their role 'Admin Assistant', the office address 'Testing - Bekki's Psychology | 1405 N Lilac Dr, Suite 151', and a dropdown for the patient 'Krystle Perrin - Test'. Below this, the 'Appointment Management' section has a search icon and a '+ New Appointment' button. A horizontal menu includes 'Appointments', 'Calendar', 'Releases', 'Scheduling Notes', and 'Patient Notes'. The 'Filter:' section includes a text input 'Enter Filter Term', a status dropdown set to 'Filled', a 'Start Date' field with '1/30/2019' and a calendar icon, and an 'End Date' field with '2/9/2019' and a calendar icon. Below these is a table with columns: Appointment, Day, Location, Type, Status, Patient, Phone, Attended?, and Actions. Callout boxes provide instructions for each of these elements.

Click to return to the main Dashboard.

Click to add a new appointment to schedule.

Click to edit profile and account settings.

Click to change the provider.

Dashboard

Janelle Esquilin | Admin Assistant | Testing - Bekki's Psychology | 1405 N Lilac Dr, Suite 151 | for Krystle Perrin - Test

Appointment Management

+ New Appointment

Appointments | Calendar | Releases | Scheduling Notes | Patient Notes

Filter: Enter Filter Term

Filled

Start Date 1/30/2019

End Date 2/9/2019

Appointment	Day	Location	Type	Status	Patient	Phone	Attended?	Actions
-------------	-----	----------	------	--------	---------	-------	-----------	---------

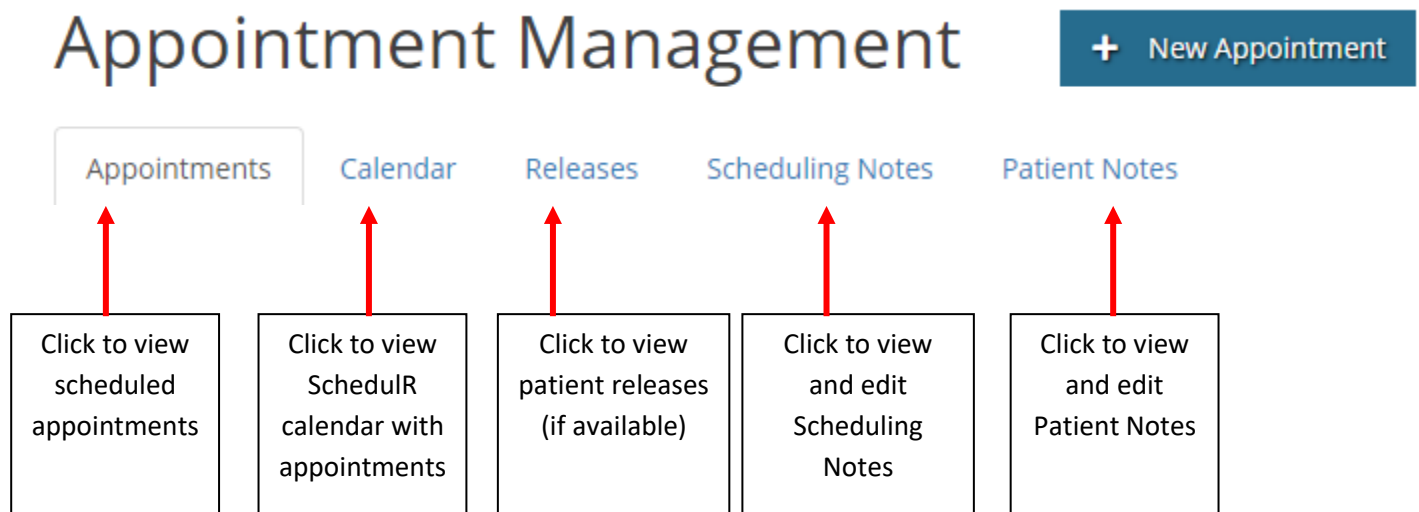
Perform a "Patient Search" by clicking this icon

Drop-down menu to view All Appointments, Filled, Open, or Incomplete

***The system will default to "Filled" Appointment settings. Click the box to change the category.

***The system will default the "End Date" 10 days out. You can either type in a new date or click on the calendar icon to select a new date.

Appointment Management Tabs



The “**Appointments**” tab will generate a **list view** of appointments.

The “**Calendar**” tab will generate a **calendar view of your SchedulR appointments**.

*** Please refer to the “[Assessments](#)” section of the user manual for information and navigation of the “Releases” tab.

SchedulR Calendar

Select desired
calendar view

Grey box = old
appointment

Click to add a new
appointment to schedule

Click to change which
provider is being viewed

DEC
Dashboard
Cora Test PV Admin | Admin Assistant, Fairview Counseling Center-Apple Valley ▾ for Cora Winberg ▾

a

Appointment Management

Appointments
Calendar
Releases
Location: scheduling Notes
Location Patient Notes

+ New Appointment

month

week

day

January 2016

today

<

>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
		3:30pm Therapy - Initial			3:30pm Therapy - Initial	
3	4	5	6	7	8	9
		3:30pm Therapy - Initial				
10	11	12	13	14	15	16
		10:30am Therapy - Initial			3:30pm Test Patient - Ther	
17	18	19	20	21	22	23
		3:30pm Therapy - Initial			3:30pm Therapy - Initial	
24	25	26	27	28	29	30
		3:30pm Therapy - Initial			3:30pm Therapy - Initial	

Yellow box =
current day

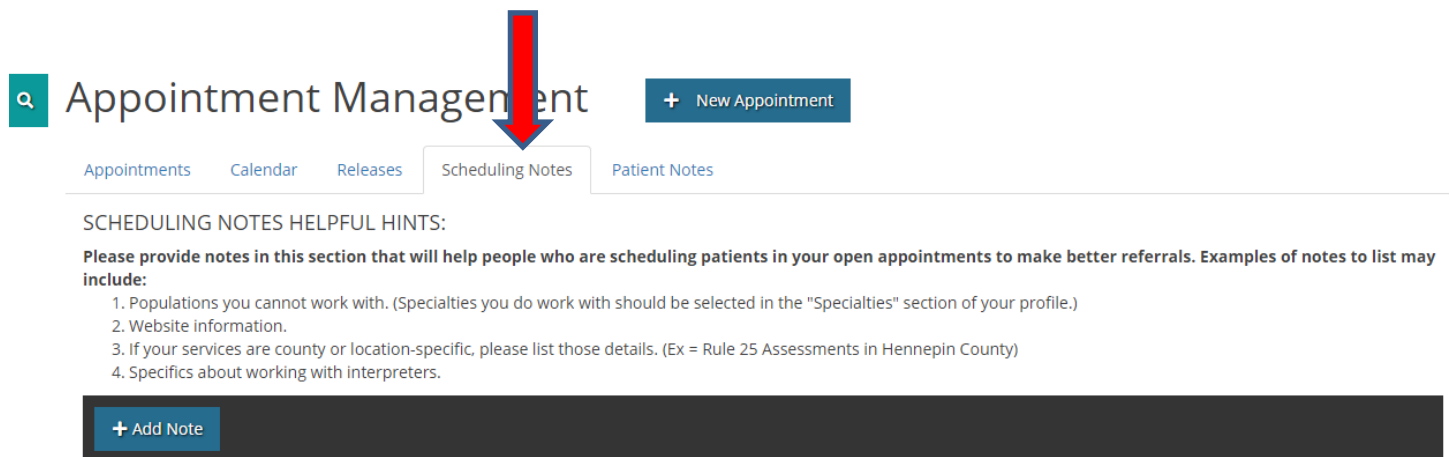
Green/Teal =
Scheduled
Appointment

Blue = current
or future
appointment

Toggle month/day/week.
Click "today" to direct
calendar to present day

Scheduling Notes

Scheduling Notes may be entered to communicate with BHP staff (intake scheduling coordinators).



Appointment Management [+ New Appointment](#)

[Appointments](#) [Calendar](#) [Releases](#) [Scheduling Notes](#) [Patient Notes](#)

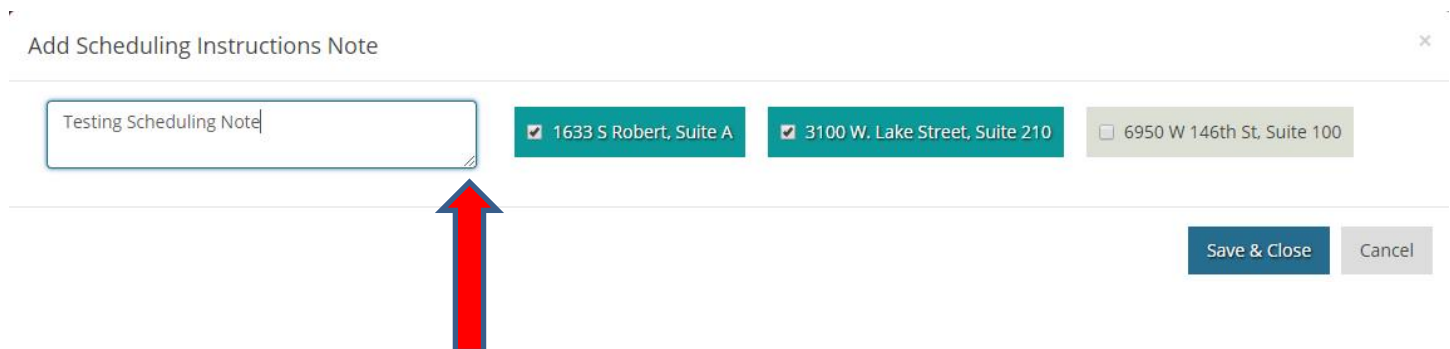
SCHEDULING NOTES HELPFUL HINTS:

Please provide notes in this section that will help people who are scheduling patients in your open appointments to make better referrals. Examples of notes to list may include:

1. Populations you cannot work with. (Specialties you do work with should be selected in the "Specialties" section of your profile.)
2. Website information.
3. If your services are county or location-specific, please list those details. (Ex = Rule 25 Assessments in Hennepin County)
4. Specifics about working with interpreters.

[+ Add Note](#)

To add a Scheduling Note, click on the “+ Add Note” button. Select the location(s) the note applies to and type in the comment box. Note that you can expand the comment box by clicking and dragging on the lower right-hand corner of the box.



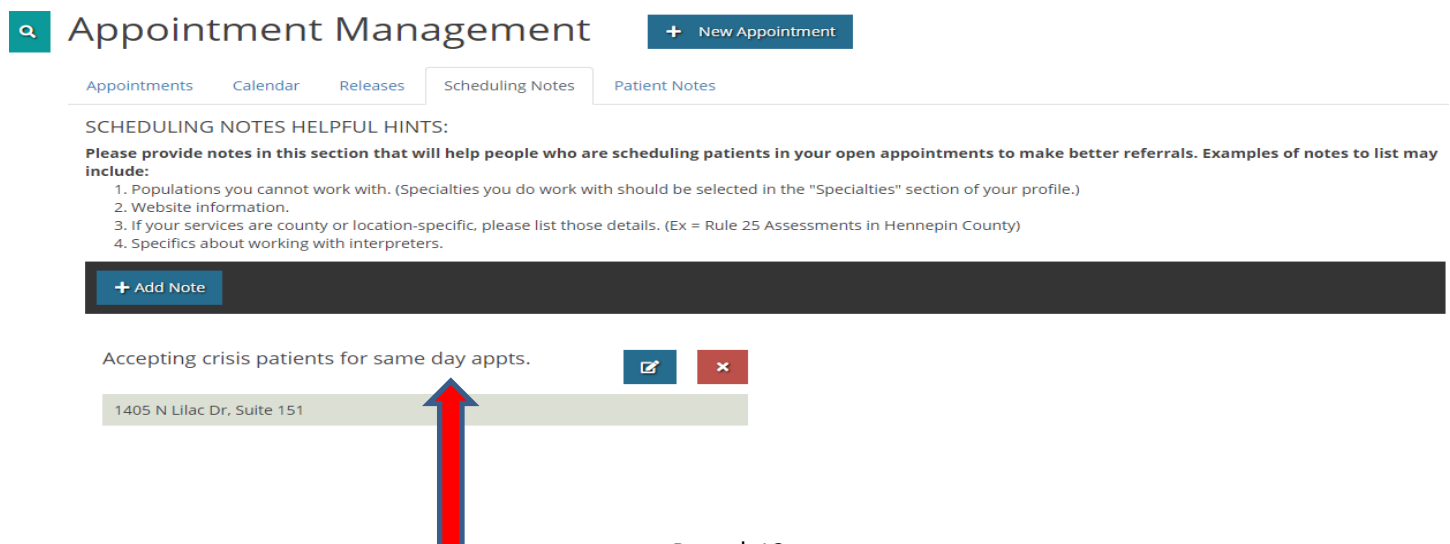
Add Scheduling Instructions Note ×

Testing Scheduling Note

☒ 1633 S Robert, Suite A ☒ 3100 W. Lake Street, Suite 210 ☐ 6950 W 146th St, Suite 100

[Save & Close](#) [Cancel](#)

Click “Save & Close” when complete. Your Scheduling Note will appear in the Scheduling Notes tab.



Appointment Management [+ New Appointment](#)

[Appointments](#) [Calendar](#) [Releases](#) [Scheduling Notes](#) [Patient Notes](#)

SCHEDULING NOTES HELPFUL HINTS:

Please provide notes in this section that will help people who are scheduling patients in your open appointments to make better referrals. Examples of notes to list may include:

1. Populations you cannot work with. (Specialties you do work with should be selected in the "Specialties" section of your profile.)
2. Website information.
3. If your services are county or location-specific, please list those details. (Ex = Rule 25 Assessments in Hennepin County)
4. Specifics about working with interpreters.

[+ Add Note](#)

Accepting crisis patients for same day appts. [✎](#) [✕](#)

1405 N Lilac Dr, Suite 151

Patient Notes

Patient Notes are any communication you wish to relay to the patients directly. The information in the Patients Notes will be printed on their appointment reminder documentation.

Appointment Management

+ New Appointment

Appointments

Calendar

Releases

Scheduling Notes

Patient Notes

PATIENT INSTRUCTIONS HELPFUL HINTS:

Please provide instructions in this section that should be given to the patient for their scheduled appointment. Examples of instructions to list may include:

1. Helpful directions to your location or for parking.
2. Items they should bring to the appointment (i.e. insurance card, paperwork, etc.)
3. How early to arrive for the appointment.
4. Pre-appointment prep work / instructions including any online paperwork to be completed.
5. Website information

+ Add Note

Click on the “+Add Note” button and then select the location(s) the note applies to. Create your Patient Note in the comment box. Again, you can expand the view of the comment box by clicking and dragging on the lower right-hand corner of the box.

Add Patient Instructions Note

Arrive 15 minutes early for check-in.

☒ 1633 S Robert, Suite A

☐ 3100 W. Lake Street, Suite 210

☒ 6950 W 146th St, Suite 100

Save & Close

Cancel

Click “Save & Close” when complete. Your Patient Note will appear in the Patients Notes tab.

Appointment Management

+ New Appointment

Appointments

Calendar

Releases

Scheduling Notes

Patient Notes

PATIENT INSTRUCTIONS HELPFUL HINTS:

Please provide instructions in this section that should be given to the patient for their scheduled appointment. Examples of instructions to list may include:

1. Helpful directions to your location or for parking.
2. Items they should bring to the appointment (i.e. insurance card, paperwork, etc.)
3. How early to arrive for the appointment.
4. Pre-appointment prep work / instructions including any online paperwork to be completed.
5. Website information

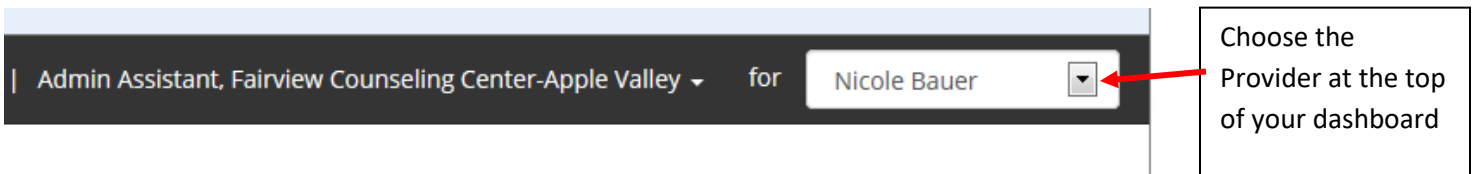
+ Add Note

Arrive 15 minutes early for check-in.

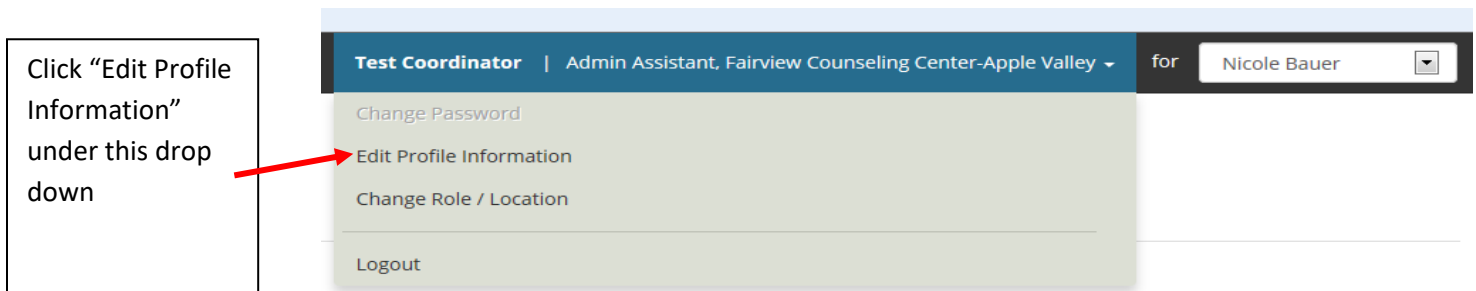
1633 S Robert, Suite A

6950 W 146th St, Suite 100

How to Edit a Provider's Profile Information



*Note: administrative staff members will have access to all providers at their company, while the provider themselves will only have access to their own information.



A screenshot of the "Edit Your Profile" page. The page is divided into two main sections: "Personal Information" on the left and "Specialties" on the right. The "Personal Information" section contains fields for Name, Gender, Provider Type, License(s), Login Email, Notification Email, Default Role, Default Location, Phone Number, and Fax Number. The "Specialties" section has a tabbed interface with "Specialties" and "Service parameters" tabs. Below the tabs is a list of specialties, each with a checkbox. A red arrow points from a text box to the "Specialties" tab.

Personal Information

Name: Krystle Perrin

Gender: Female

Provider Type: Therapist

License(s): LPC

Login Email: kperrin@bhpnet.com

* Notification Email: kperrin@bhpnet.com

Default Role: Admin Assistant

Default Location: Choose default location

* Phone Number: (763) 525-9919

Fax Number:

Specialties

You are required to provide BHP verification of certification for any specialty marked with an asterisk (*). If BHP finds that a specialty has been selected in your profile and verification has not been provided, the specialty may be removed at BHP's discretion until proper verification is in place. Please contact Network Services at webapps@bhpnet.com with any questions about provider specialties.

<input type="checkbox"/> Abortion Recovery	<input type="checkbox"/> Abuse & Violence	<input type="checkbox"/> ADHD Evaluations
<input type="checkbox"/> ADHD Therapy	<input type="checkbox"/> Adolescent Issues	<input type="checkbox"/> Adoption Issues
<input type="checkbox"/> Affective Disorders	<input type="checkbox"/> AIDS Issues	<input type="checkbox"/> Allergy & Immunology
<input type="checkbox"/> Alzheimer's	<input type="checkbox"/> American Sign Language	<input type="checkbox"/> Ancillary Nurse
<input type="checkbox"/> Anger Management	<input type="checkbox"/> Anxiety Disorders	<input type="checkbox"/> Asperger's
<input type="checkbox"/> Assault Victim	<input type="checkbox"/> Audiology & Hearing	<input type="checkbox"/> Autism Evaluations
<input type="checkbox"/> Autism Treatment	<input type="checkbox"/> Bariatric Evaluations	<input type="checkbox"/> Behavioral Disorders
<input type="checkbox"/> Biofeedback Therapy*	<input type="checkbox"/> Bipolar	<input type="checkbox"/> Blended Families
<input type="checkbox"/> Borderline Personality Disorder	<input type="checkbox"/> Brain Injury	<input type="checkbox"/> Buprenorphine/Suboxone
<input type="checkbox"/> Bus Line-Within 10 Blocks	<input type="checkbox"/> Bus Line-Within 2 Blocks	<input type="checkbox"/> Career Counseling
<input type="checkbox"/> Caregivers	<input type="checkbox"/> CD Recovery Issues	<input type="checkbox"/> Chemical Health Evaluations*
<input type="checkbox"/> Christian Counseling/Spirituality	<input type="checkbox"/> Chronic Pain/Health Issues	<input type="checkbox"/> Codependency/Adult Children

Save & Close Cancel

Each one of these tabs must be completed at set up and updated as needed.

Notification Email field

The Notification Email field allows Care Connect to communicate with providers and administrative staff when appointments are scheduled or canceled. The Notification Email field also allows BHP to communicate with providers and staff regarding any system or business process changes.

Multiple Notification Recipients

To add multiple recipients of notification emails, first, enter the first email address in the “Notification Email” field. Then enter a semi colon (;) followed by a space and then the subsequent email address.

Example: janessmith@yourclinic.com; bobsmith@yourclinic.com; etc

Appointments

NOTE: Provider appointments will not be filled until the “Service Parameters” are completed and Specialties are added. This ensures clinically appropriate referrals

Who Can I add an Appointment for?

Providers will be able to add/access appointments for themselves only. Administrative staff members will have access to all providers and facilities within their company. A user can be allowed to have dual roles on one account if needed; it is possible for a user to be set up as both a provider and an administrative staff member.

Creating an Appointment

Before adding the first appointment, check to make sure the profile information has been completed. You may add a new appointment at any time by clicking the “+ New Appointment” icon at the top of the Appointment Management page. Once “+ New Appointment” is selected, a new window will appear with the following options:

Add Appointment

* Date

MM/DD/YYYY

* Start Time

* End Time

* Location

-- Select Location --

* Recurring

Yes

No

* Appointment Type

☐ CD Assessment

☐ Day Treatment

☐ DBT

☐ FMG Referral

☐ In-Home

☐ Medical - Follow-Up

☐ Medical - Initial

☐ Medical - Procedure

☐ Medication Mgmt - Follow-Up

☐ Medication Mgmt - Initial

☐ Partial Hospitalization

☐ Telemedicine Therapy

☐ Testing

☐ Therapy - Follow-Up

☐ Therapy - Initial

Save & Close


Cancel

Be sure to fill in all **required options, labeled with an asterisk “*” symbol**. Select the date that you wish to add an appointment, followed by the appointment’s start and end time. If your clinic has more than one location, be sure to choose the correct location in which you wish to offer this appointment. Next, select the correct type of appointment to receive proper referrals. Lastly, if you wish to make this appointment occur on a regular basis, select “Yes” in the top right corner by “Reoccurring.” If this appointment is only meant to be offered once, select “No.”

Reoccurring Appointments

For reoccurring appointments, the following options will appear only after you have selected a response for the first three fields (Recurring, Repeat Until, and Frequency).

*** Recurring** ☒ Yes ☐ No

*** Repeat Until** 

*** Frequency** ☒ Weekly ☐ Monthly

-- Select Frequency -- ▾

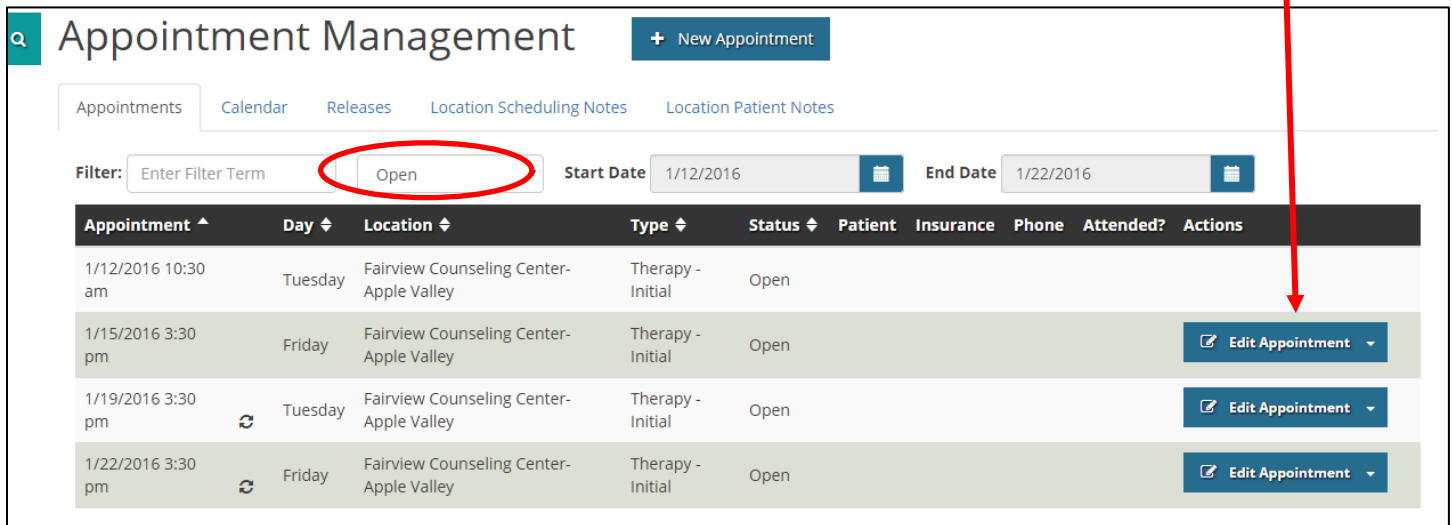
☐ Sunday ☐ Monday ☐ Tuesday

☐ Wednesday ☐ Thursday

☐ Friday ☐ Saturday

Editing an Open Appointment

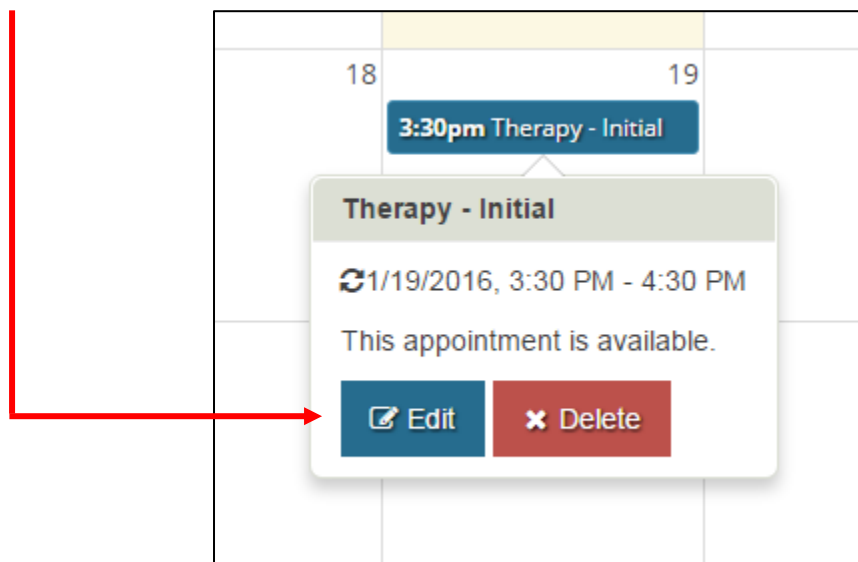
You may edit open appointment by selecting the “Appointments” tab and filtering for “Open” appointments using the dropdown menu. Locate the appointment you wish to edit and select “Edit Appointment.”



The screenshot shows the "Appointment Management" interface. At the top, there is a search bar and a "+ New Appointment" button. Below this, there are tabs for "Appointments", "Calendar", "Releases", "Location Scheduling Notes", and "Location Patient Notes". The "Appointments" tab is selected. A filter dropdown menu is open, showing "Open" selected, which is circled in red. To the right of the filter, there are fields for "Start Date" (1/12/2016) and "End Date" (1/22/2016). Below these fields is a table of appointments. The table has columns: Appointment, Day, Location, Type, Status, Patient, Insurance, Phone, Attended?, and Actions. The first row shows an appointment on 1/12/2016 at 10:30 am. The second row shows an appointment on 1/15/2016 at 3:30 pm, which is highlighted in green. The third row shows an appointment on 1/19/2016 at 3:30 pm, which is highlighted in blue. The fourth row shows an appointment on 1/22/2016 at 3:30 pm, which is highlighted in green. Each row has an "Edit Appointment" button in the Actions column, which is circled in red. A red arrow points from the top right of the page down to the "Edit Appointment" button for the 1/19/2016 appointment.

Appointment	Day	Location	Type	Status	Patient	Insurance	Phone	Attended?	Actions
1/12/2016 10:30 am	Tuesday	Fairview Counseling Center-Apple Valley	Therapy - Initial	Open					
1/15/2016 3:30 pm	Friday	Fairview Counseling Center-Apple Valley	Therapy - Initial	Open					Edit Appointment
1/19/2016 3:30 pm	Tuesday	Fairview Counseling Center-Apple Valley	Therapy - Initial	Open					Edit Appointment
1/22/2016 3:30 pm	Friday	Fairview Counseling Center-Apple Valley	Therapy - Initial	Open					Edit Appointment

From the “Calendar” tab, you may change appointment attributes at any time by clicking on an appointment on the provider’s calendar and then choosing the “Edit” option.



The screenshot shows a calendar view for the month of January 2016. The date 18 is highlighted in yellow. The date 19 has a blue appointment slot labeled "3:30pm Therapy - Initial". A popup window is open over the 19th, showing the appointment details: "Therapy - Initial", "1/19/2016, 3:30 PM - 4:30 PM", and "This appointment is available." Below the details are two buttons: "Edit" (blue) and "Delete" (red). A red arrow points from the top left of the page down to the "Edit" button.

****** If the appointment being edited is reoccurring, you will be asked if you wish to edit “Just This One” or if you wish to edit “The Entire Series” of appointments. Choose the correct option and proceed to make the proper changes.

Editing a Scheduled Appointment

You may view all scheduled appointments by going to the “Appointments” page and filtering for “Filled” appointments. After the filled appointment(s) appear on the screen, you may view a brief summary of the appointment. This includes scheduled time, day, location (if more than one clinic location), type of appointment, status (Filled, Open, or Incomplete), patient name, patient’s insurance, patient’s phone. The “View Notes” option will display this information in more in-depth detail.

The screenshot shows the 'Appointment Management' interface. At the top, there's a search bar and a '+ New Appointment' button. Below that are tabs for 'Appointments', 'Calendar', 'Releases', 'Scheduling Notes', and 'Patient Notes'. A filter bar shows 'Filter: Enter Filter Term' with 'Filled' selected, and date pickers for 'Start Date' (1/29/2019) and 'End Date' (2/8/2019). A table lists appointments with columns: Appointment, Day, Location, Type, Status, Patient, Phone, Attended?, and Actions. A red circle highlights the 'Filled' filter. A red arrow points from a 'Delete appointment' box to the 'x' icon in the Actions column. Another red arrow points from a 'Filter for “Filled” appointments to see scheduled appts' box to the 'Filled' filter. Three red arrows point from boxes labeled 'View appt notes', 'View patient profile', and 'Reschedule appt' to the menu, person, and clock icons in the Actions column, respectively.

Appointment Management + New Appointment

Appointments Calendar Releases Scheduling Notes Patient Notes

1 Attendance Not Marked

Filter: Enter Filter Term **Filled** Start Date 1/29/2019 End Date 2/8/2019

Appointment	Day	Location	Type	Status	Patient	Phone	Attended?	Actions
1/30/2019 12:30 pm	Wednesday	1633 S Robert, Suite A	In-Home, Medication Mgmt - Initial, Therapy - Initial	Filled	Chester Tester			

Delete appointment

Filter for “Filled” appointments to see scheduled appts

View appt notes

View patient profile

Reschedule appt

From the “Appointments” tab, you may change appointment attributes for a scheduled appointment **with the same provider**. First, in the upper right-hand box, select the provider that the appointment was originally scheduled with.

Under the “Actions” column, click on the clock icon

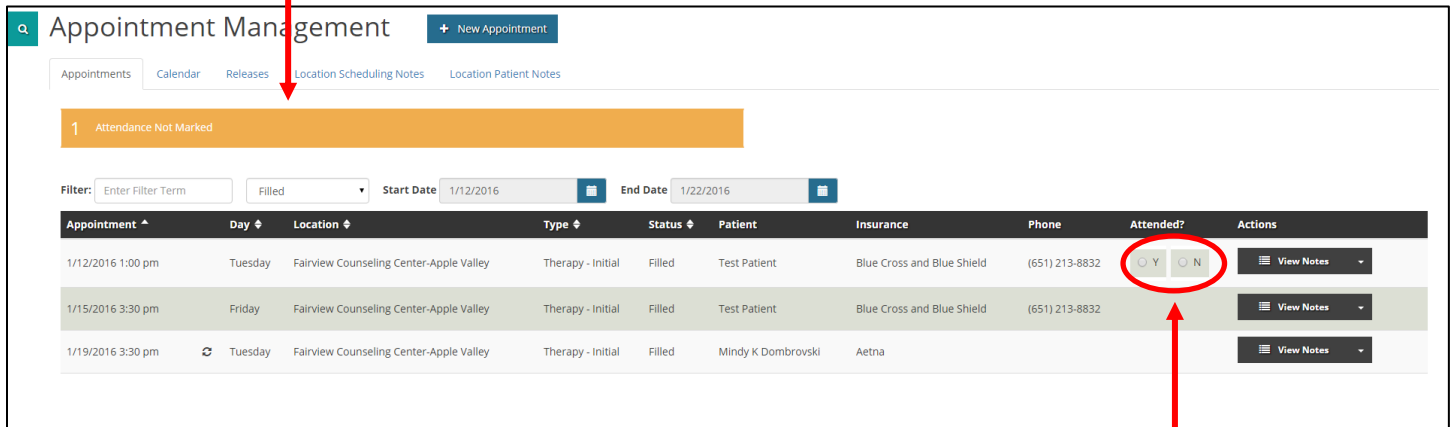
A close-up of the 'Actions' column from the screenshot above. It shows five icons: a menu icon, an edit icon, a person icon, a clock icon, and a delete icon. A large red arrow points directly to the clock icon.

Actions

Complete the fields and click “Save & Close”. A second screen will appear to confirm you would like to reschedule the appointment.

Verifying Attendance

After a scheduled appointment has passed, your dashboard will show that you have “Attendance Not Marked”



The screenshot shows the 'Appointment Management' dashboard. At the top, there is a search bar and a '+ New Appointment' button. Below this are tabs for 'Appointments', 'Calendar', 'Releases', 'Location Scheduling Notes', and 'Location Patient Notes'. A red arrow points from the text 'Attendance Not Marked' to an orange notification bar that says '1 Attendance Not Marked'. Below the notification bar is a filter section with a text input 'Enter Filter Term', a dropdown menu set to 'Filled', and date pickers for 'Start Date' (1/12/2016) and 'End Date' (1/22/2016). The main part of the dashboard is a table with the following columns: Appointment, Day, Location, Type, Status, Patient, Insurance, Phone, Attended?, and Actions. The 'Attended?' column contains two radio buttons, 'Y' and 'N', which are circled in red. A red arrow points from the text 'Attendance Not Marked' to the 'Y' radio button. The table lists three appointments: 1/12/2016 1:00 pm, 1/15/2016 3:30 pm, and 1/19/2016 3:30 pm. Each row has a 'View Notes' button in the Actions column.

Appointment	Day	Location	Type	Status	Patient	Insurance	Phone	Attended?	Actions
1/12/2016 1:00 pm	Tuesday	Fairview Counseling Center-Apple Valley	Therapy - Initial	Filled	Test Patient	Blue Cross and Blue Shield	(651) 213-8832	<input type="radio"/> Y <input type="radio"/> N	View Notes
1/15/2016 3:30 pm	Friday	Fairview Counseling Center-Apple Valley	Therapy - Initial	Filled	Test Patient	Blue Cross and Blue Shield	(651) 213-8832	<input type="radio"/> Y <input type="radio"/> N	View Notes
1/19/2016 3:30 pm	Tuesday	Fairview Counseling Center-Apple Valley	Therapy - Initial	Filled	Mindy K Dombrowski	Aetna		<input type="radio"/> Y <input type="radio"/> N	View Notes

Please click on the orange bar and the appointments that are missing attendance tracking will appear on your screen.

When this notification is displayed, you must check “Yes” or “No” under the “Attended” column to report if the patient attended the scheduled appointment, or if they did not attend the appointment.

Completion of attendance tracking helps BHP ensure that patients are receiving the coordination of care that they need. BHP staff will follow up with provider offices to verify any unmarked attendance fields.

View Notes Section

By clicking the “View Notes” section, a pop-up box will show up with brief appointment notes. If the patient was scheduled by the Intake Department, any pertinent patient information, such as reason for referral and current medications, will show up in the “Other Information” section.

Filter:

Provider Name	Appointment	Day	Location	Type	Status	Patient	Phone	Attended?	Actions
Test Provider	7/20/2016 11:37 am	Wednesday	6950 W 146th St, Suite 100	Therapy - Initial	Filled	Chester Tester	(999) 999-9999	<div><input type="radio"/> Y</div> <div><input type="radio"/> N</div>	<div>View Notes</div>
Test Provider	8/1/2016 11:37 am	Monday	6950 W 146th St, Suite 100	Therapy - Initial	Filled	Chester Tester	(999) 999-9999	<div><input type="radio"/> Y</div> <div><input type="radio"/> N</div>	<div>View Notes</div>

Scheduled Appointment

Date: Tuesday, 5/10/2016 | **Time:** 2:33 pm - 3:33 pm

Provider: Nicole Bauer, MA

Location: Fairview Counseling Center-Apple Valley, 15650 Cedar Ave, Apple Valley, MN 55124

Phone: (763) 210-4661

Type: Therapy - Initial

Scheduling Instructions

Patient Instructions
Testing the Patient Notes here.

Other Information If the patient is from Intake, notes will be here

Scheduled By: Mindy Dombrovski **Scheduled On:** 5/10/2016 12:27:10 AM

Close

View Profile Section

By clicking the “View Profile” section, a pop-up box will show up with detailed patient notes, such as name, DOB, legal guardian (if applicable), and insurance information. If the patient was scheduled from the DEC and signed an ROI, an assessment will be available in the “Assessment” tab.

Brighton Early

1234 East 5th Street
Minneapolis, MN 55416

Birthdate

1/1/2001

Age

15

Gender

Male

Guardian Name

Mother Early

Guardian Relationship

mother

Medical Record ID

Insurance

Primary Insurer

Blue Cross and Blue Shield

Insurance Group ID

Insurance ID

1234324544

Relationship

Parent / Guardian

Secondary Insurance

No

Patient History

Assessments

Appointments

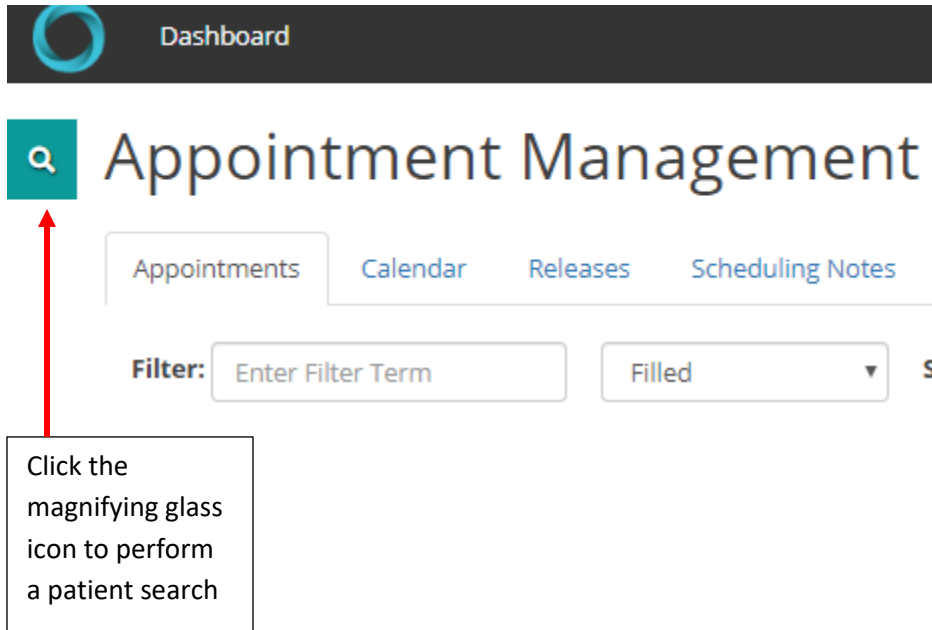
Assessments

Date	Location	Assessor	Status
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Assessments

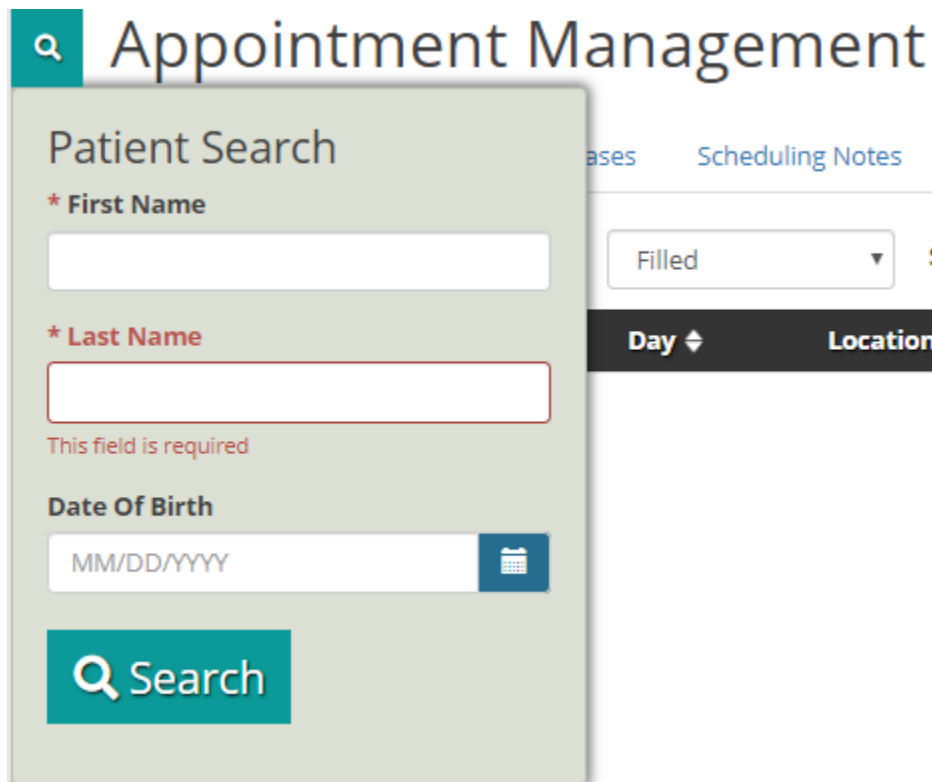
Patient Search

Patients that have signed a Release of Information (ROI) or that have been scheduled with an appointment in Care Connect will appear in the Patient Search tool.



The screenshot shows the top of the 'Appointment Management' dashboard. A dark header bar contains a circular logo and the word 'Dashboard'. Below this, the title 'Appointment Management' is displayed next to a magnifying glass icon. A red arrow points from a callout box to this icon. The callout box contains the text: 'Click the magnifying glass icon to perform a patient search'. Below the title, there are tabs for 'Appointments', 'Calendar', 'Releases', and 'Scheduling Notes'. Further down, there is a 'Filter:' section with a text input field labeled 'Enter Filter Term' and a dropdown menu currently set to 'Filled'.

A search window will appear. Type in the first and last name of the patient. Fields marked with an asterisk are required.



The screenshot shows the 'Patient Search' modal window overlaid on the 'Appointment Management' dashboard. The modal has a title 'Patient Search' and contains the following fields: a required 'First Name' field, a required 'Last Name' field with a red border and a red message 'This field is required' below it, and a 'Date Of Birth' field with a placeholder 'MM/DD/YYYY' and a calendar icon. At the bottom of the modal is a large teal button with a magnifying glass icon and the text 'Search'. In the background, the 'Appointment Management' dashboard is visible, showing the 'Appointments' tab selected and a table with columns 'Day' and 'Location'.

Releases

Patients that have signed a Release of Information (ROI) to share their DEC assessment will appear here. Admin Assistants must first select a provider in the upper right-hand corner to see any available ROIs.

Viewing an Assessment

If the patient has signed a Release of Information (ROI), an assessment will appear under the “Releases” section.

The screenshot shows the DEC Appointment Management interface. At the top, there is a dark header with the DEC logo and the word 'Dashboard'. Below this is a white header with a search icon, the title 'Appointment Management', and a '+ New Appointment' button. A navigation bar contains tabs for 'Appointments', 'Calendar', 'Releases', 'Scheduling Notes', and 'Patient Notes'. A red arrow points to the 'Releases' tab with a text box that says: 'Click “Releases”. Make sure that you are on the correct provider’s page before you do this'.

Below the navigation bar, there is a 'Filter:' input field. A table displays release information with columns: 'Patient', 'Release Date', and 'Actions'. The table has two rows, both for 'Alli Patient' with a release date of '1/27/2016'. A red arrow points from the 'Actions' column of the first row to a text box that says: 'Click on “View Profile” for the assessment you would like to view'.

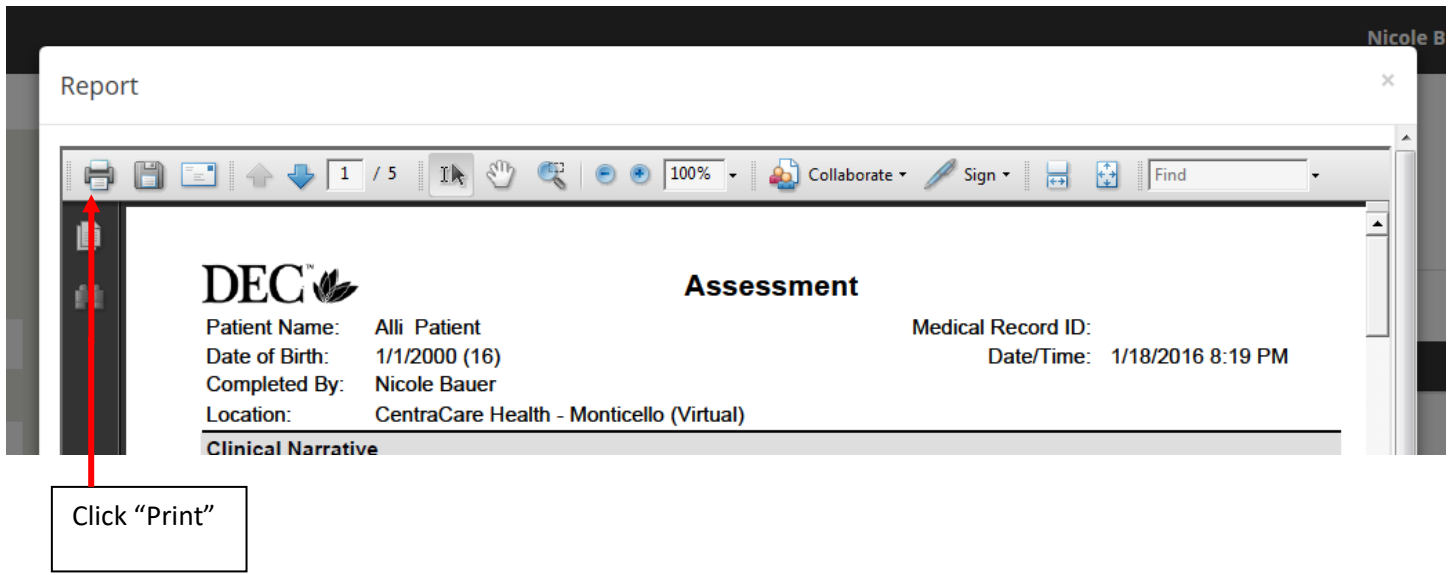
Below the table, there is a 'Patient History' section with tabs for 'Assessments' and 'Appointments'. Under 'Assessments', there is another table with columns: 'Date', 'Location', 'Assessor', 'Status', 'Final Disposition', and 'Actions'. The table has one row with the following data: Date: '1/16/2016 8:35 pm', Location: 'CentraCare Health - Monticello (Virtual)', Assessor: 'Nicole Bauer', Status: 'Audit In Progress', Final Disposition: 'Inpatient'. A red arrow points from the 'Actions' column of this row to a text box that says: 'Click “View Report”'.

Patient	Release Date	Actions
Alli Patient	1/27/2016	
Alli Patient	1/27/2016	

Date	Location	Assessor	Status	Final Disposition	Actions
1/16/2016 8:35 pm	CentraCare Health - Monticello (Virtual)	Nicole Bauer	Audit In Progress	Inpatient	

Printing an Assessment

For the first step, open the assessment. You may reference the steps above if needed



The screenshot shows a web application window titled "Report" with a close button (X) in the top right corner. The window contains a toolbar with various icons: a printer (highlighted by a red arrow), a save icon, a document icon, a zoom in icon, a zoom out icon, a 100% zoom level, a "Collaborate" button, a "Sign" button, and a "Find" search bar. Below the toolbar, the main content area displays the DEC logo and the title "Assessment". The patient information is listed as follows:

Patient Name:	Alli Patient	Medical Record ID:	
Date of Birth:	1/1/2000 (16)	Date/Time:	1/18/2016 8:19 PM
Completed By:	Nicole Bauer		
Location:	CentraCare Health - Monticello (Virtual)		

Below the patient information, there is a section titled "Clinical Narrative". A red arrow points from the print icon in the toolbar to a callout box that says "Click 'Print'".

Frequently Asked Questions

Can I login for a different user?

Users are not allowed to login using someone else's login information. A Systems Access Form (SAF) is required to create administrative user accounts.

Who do I contact to obtain a Systems Access Form (SAF)?

Email webapps@bhpnet.com to obtain a SAF .

Who do I contact with technical issues or SchedulR questions?

For any SchedulR-related questions, please email webapps@bhpnet.com.

Who do I contact with questions regarding appointments which were scheduled?

Please call our scheduling staff at (763)525-1746 and press 0 for Reception. Staff will direct you to the appropriate department.

How do I add Scheduling Notes for BHP Scheduling Coordinators and for Patients?

Please see the sections under **Dashboard Orientation** titled [Scheduling Notes](#) or [Patient Notes](#).

How do I add additional providers?

Providers who are non-licensed and being supervised may be added to Care Connect if they are being supervised by a BHP credentialed provider and offering appointments through SchedulR. Please submit a Systems Access Form to request access.

To add fully licensed providers, contact Network Services at nservices@bhpnet.com to obtain information on how to request an application.

How do I add or remove a practice location?

Email nservices@bhpnet.com to initiate any location change requests.