BEHAVIORAL
HEALTHCARE
PROVIDERS

Care Connect User Manual

ROLE: Providers and Administrative Assistants

Contents

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

Provider Profile

- Verify Notification Email, Phone, and Fax
- Add Specialties
- Add Service Parameters

Create & Manage Appointments

- Add Appointment
- Include Reocurrence, appointment type, and location
- Include appointment start, end time & recurrence pattern
- View patient profile & released assessments
- Reschedule appointments if necessary

Update Appointment Attendance

- Filter for "Incomplete" appointments
- Mark attendance for all unmarked appointments
- Select correct attendance record for the appointment

Logging In & Account Reset

Initial Login

You will receive an email from onlinecare@bhpnet.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@bhpnet.com.

Thank you for working with us!

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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 the Account Setup page:

Account Setup

Welcome to Care Connect! Because this is your first time logging in, we need to ask you a few questions to complete your account setup. It should only take a few minutes.

Personal Information

Name [redacted]

Login Email [redacted]

* Notification Email [redacted]

Default Role: Choose default role

* Phone Number [redacted]

Fax Number

* Gender Identity: Female

End User License Agreement

☐ I have read and agree to the End User License Agreement

Password

Password

Confirm Password

Asterisks

Asterisks (*) indicate a required field.

Passwords must contain the following criteria:

- Minimum of 8 characters
- Upper case letter
- Lower case letter
- Special character (i.e.; $, *, &)
- Number
- Example: Spring1234!

Providers Only

Gender Identity Information

* Do You Treat Female?	Yes	No
* Do You Treat Male?	Yes	No
* Do You Treat Gender Non-Conforming?	Yes	No
* Do You Treat Gender Non-Binary?	Yes	No
* Do You Treat Transgender Female?	Yes	No
* Do You Treat Transgender Male?	Yes	No
* Do You Treat Other?	Yes	No
* Do You Treat Prefer Not To Answer?	Yes	No

Sex Assigned At Birth

* Do You Treat Males?	Yes	No
* Do You Treat Females?	Yes	No

Other Parameters

* Insurance Accepted

Active Insurance - Patient Wants To Be Self-Pay	Aetna	America's PPO
Blue Cross Blue Shield	Cigna - HP	Health Partners
Hennepin Health (MHP)	Humana	LaborCare UnitedHealthcare - UBH
Medica - UBH	Medical Assistance - MN Medicaid	Medicare
NOT BILLABLE - Blue Cross Blue Shield	NOT BILLABLE - Health Partners	NOT BILLABLE - Medical Assistance
NOT BILLABLE - PreferredOne	NOT BILLABLE - UBH (Medica & LaborCare)	NOT BILLABLE - UCare
PENDING - Medical Assistance	PreferredOne	PrimeWest Health
SelectCare - UBH	Self-Pay	South Country Health Alliance
Tricare	UCare	United Healthcare
Value Options	WI Medicaid	Wilderness Health ACO

* Specialties [Specialties]

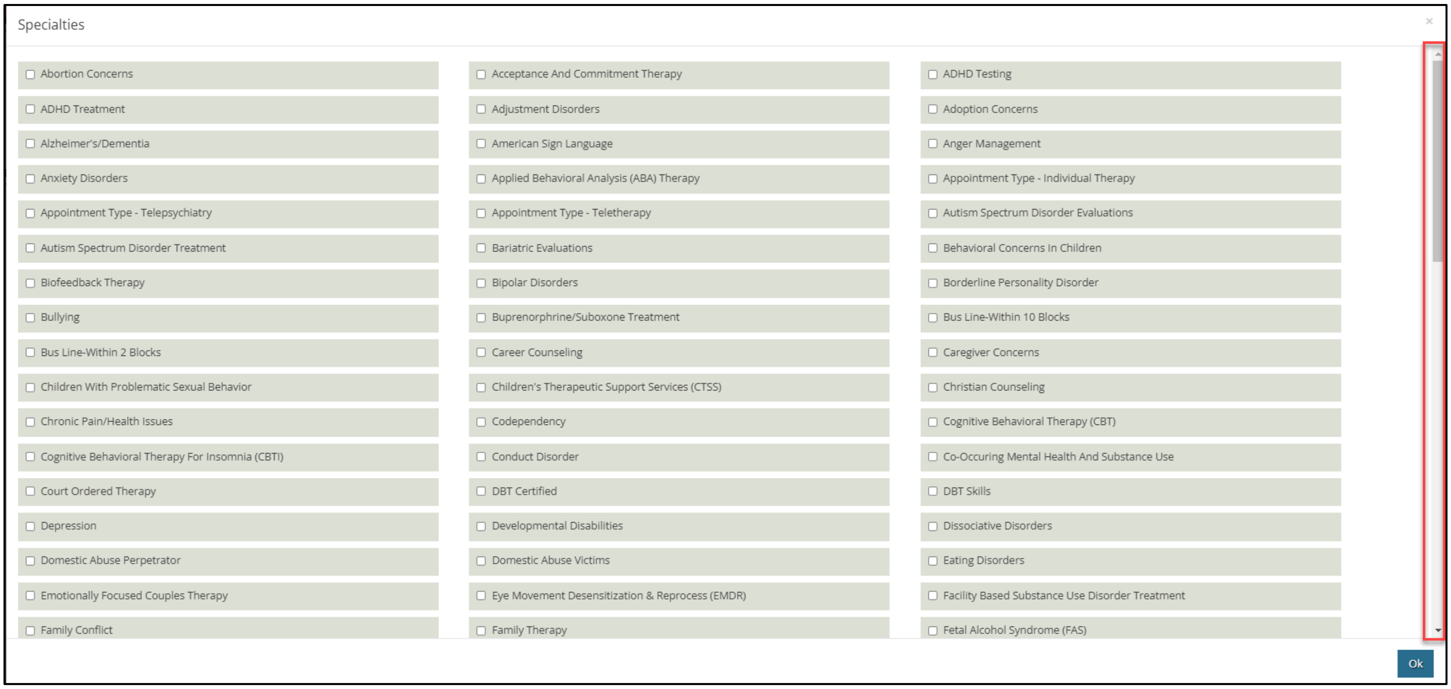
* Are You Accepting New Patients? Yes No

Set Up Account

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.

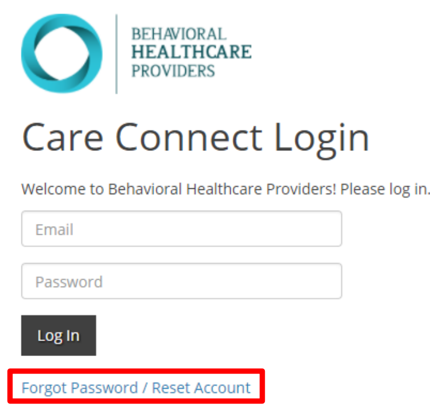


For specialties with an asterisk (*), certification is required.

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

Account Reset

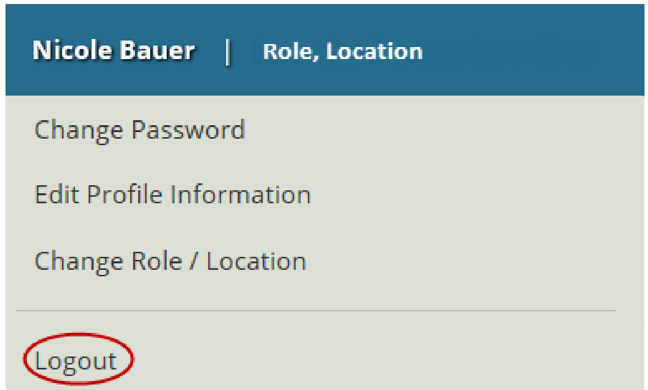
If you cannot locate the account activation email, select the “Forgot Password / Reset Account” link on the login page: https://onlinecare.bhpnet.com. This link may be used anytime you have locked your account or forgotten your password.



If you continue to experience login issues, please contact us as DEPT-CareConnect@fairview.org.

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).



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.

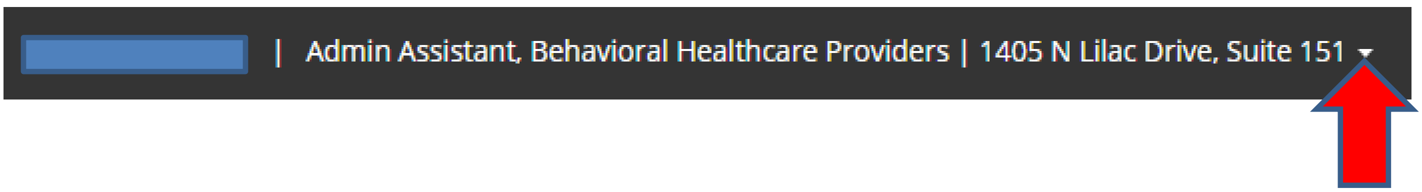
You may reference "**How to Edit a Provider's Profile Information**" and "**Appointments**" in the table of contents page for more information about how to complete these tasks.

Administrative staff members must request a Systems Access Form (SAF) from Network Services to create their user account. Please email dept-nservices@fairview.org for SAF requests.

Viewing/Editing Your Personal Account Settings

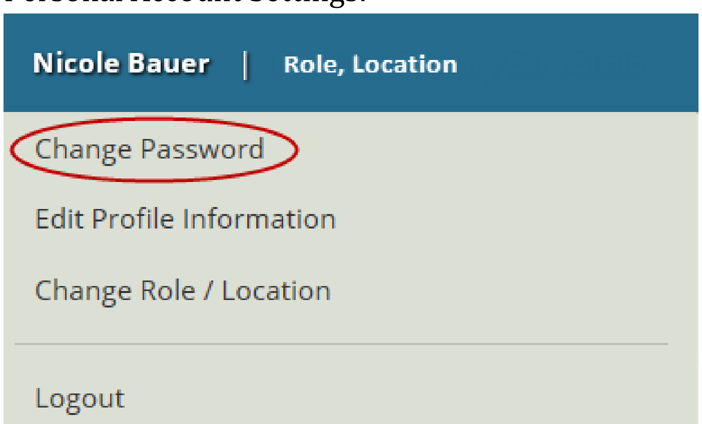
To Access your Personal Account Settings

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

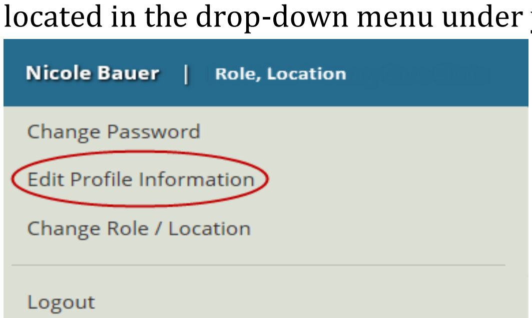
You may change your account password at any time by selecting "Change Password" located in your Personal Account Settings:



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

Editing Your Profile

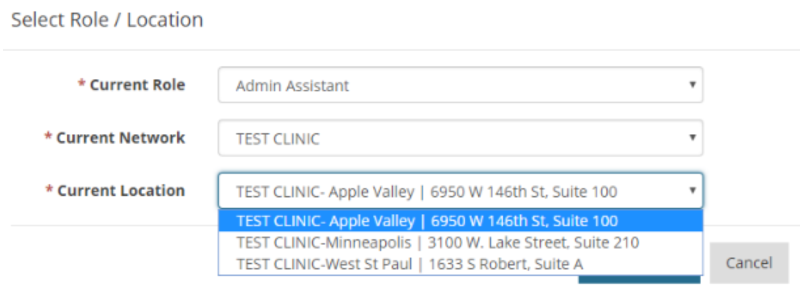
You may edit your profile information at any time by selecting the link for "Edit Profile Information" located in the drop-down menu under your name, role and logged in location.



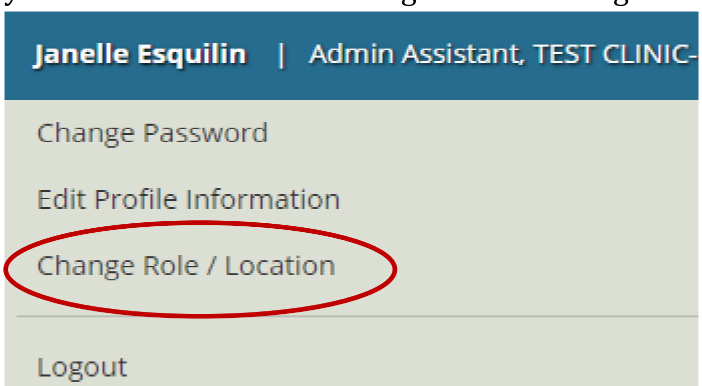
A new window will appear that provides options to update your profile information. You may select the 'x' in the top right corner to close the window and cancel any changes made or select "Save & Close" when your edits are done to save any changes made.

Changing Your Login Location

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



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"



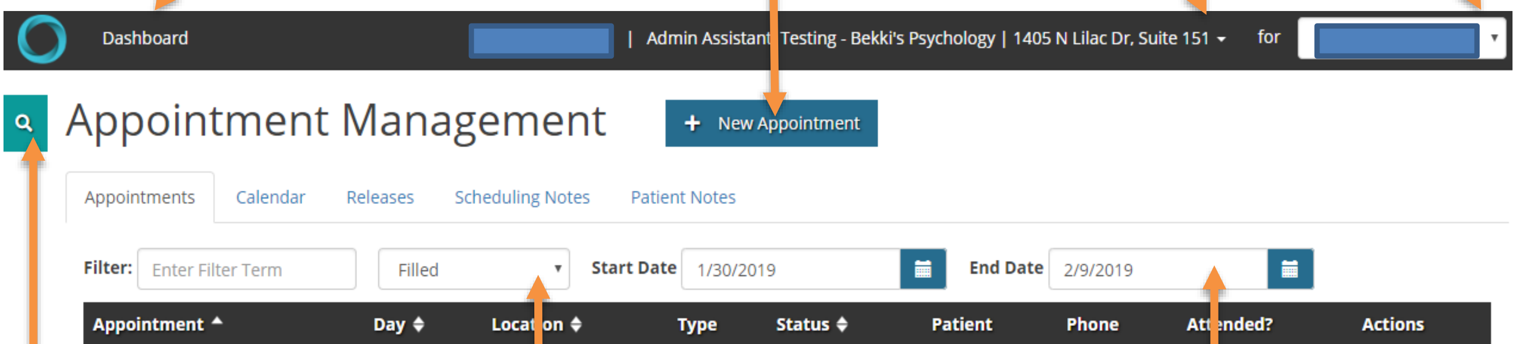
Dashboard Orientation

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.



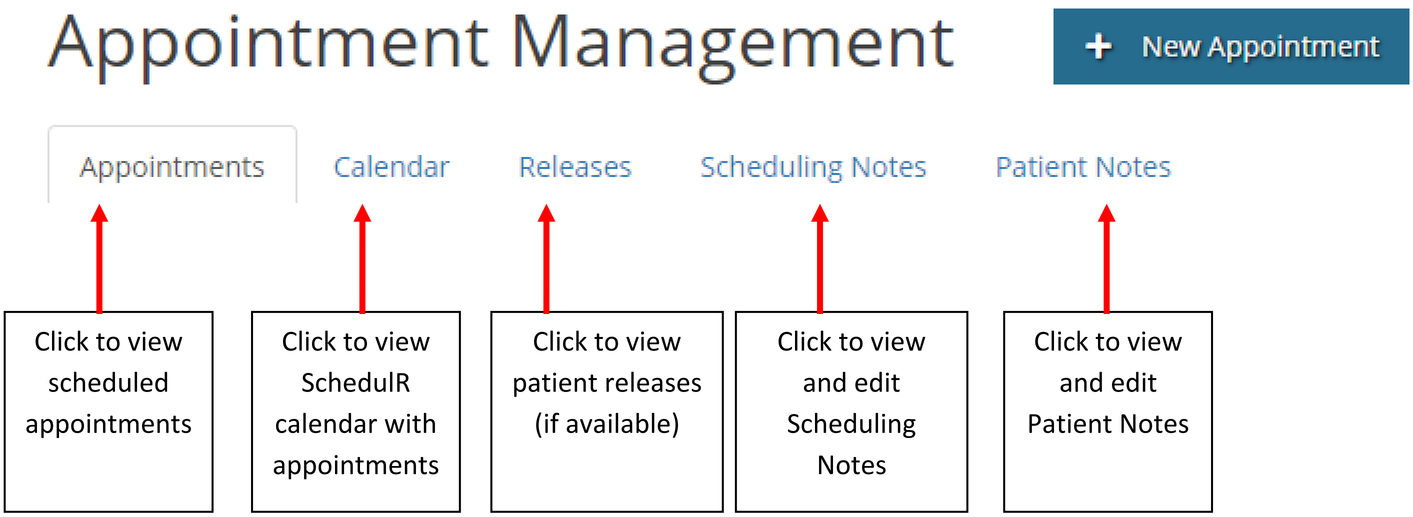
Perform a “Patient Search” by clicking this icon

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

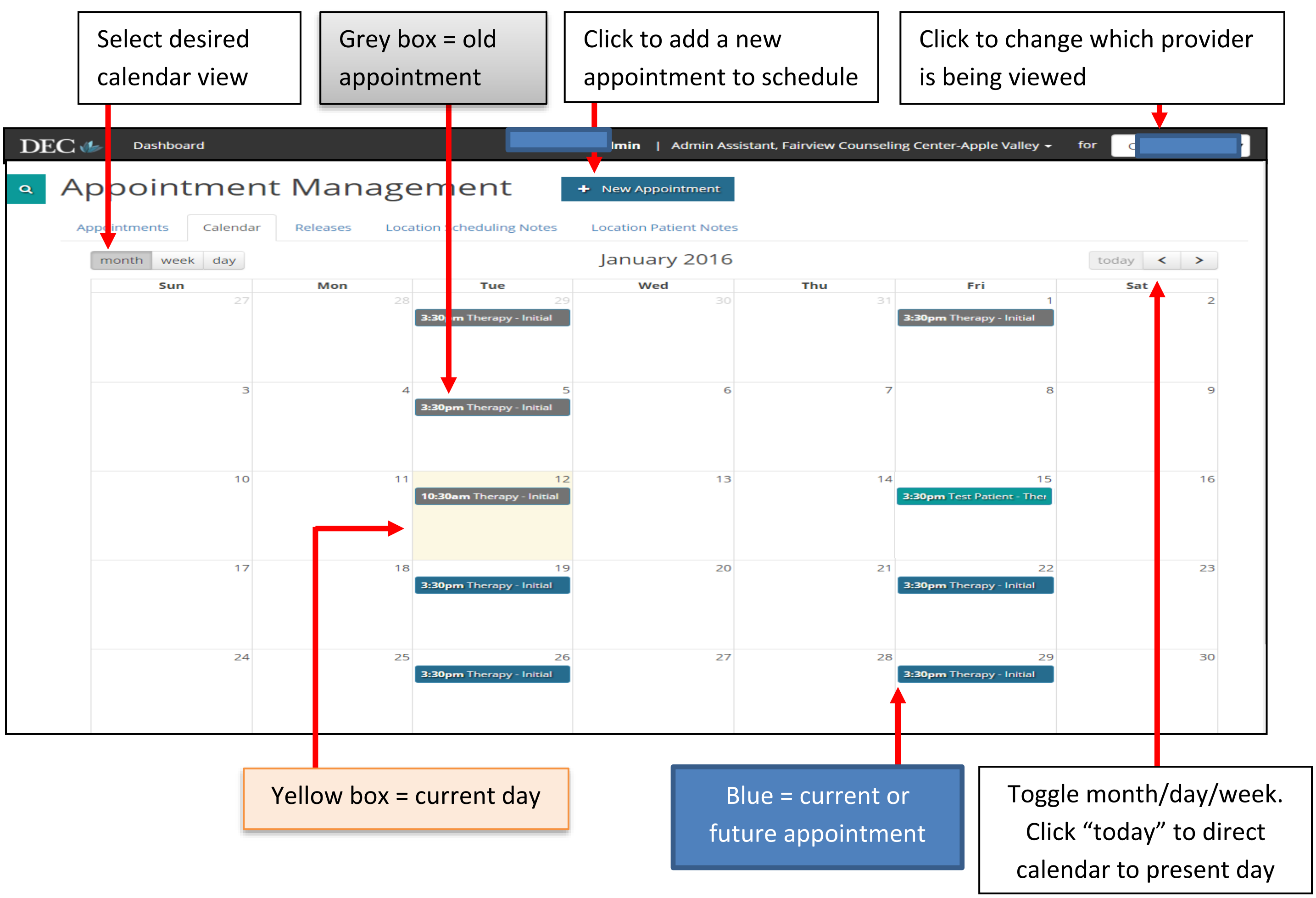


The "**Appointments**" tab will generate a **list view** of appointments.

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

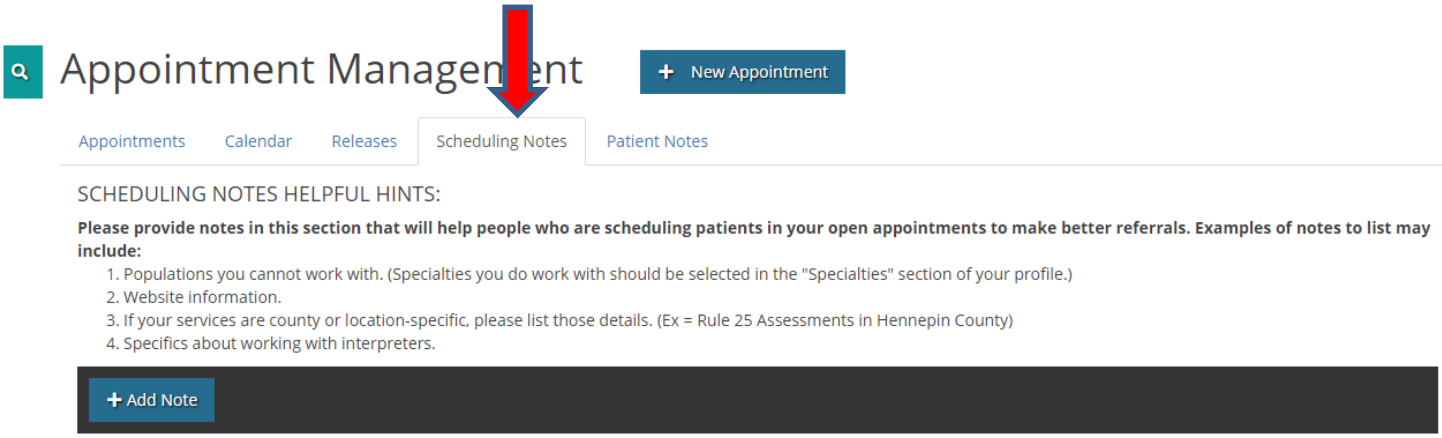
*** Please refer to the "[Assessments]" section of the user manual for information and navigation of the "Releases" tab.

SchedulR Calendar



Scheduling Notes

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



Below are examples of best practices for Scheduling Notes when offering appointments on SchedulR:

<u>Scheduling Notes:</u>

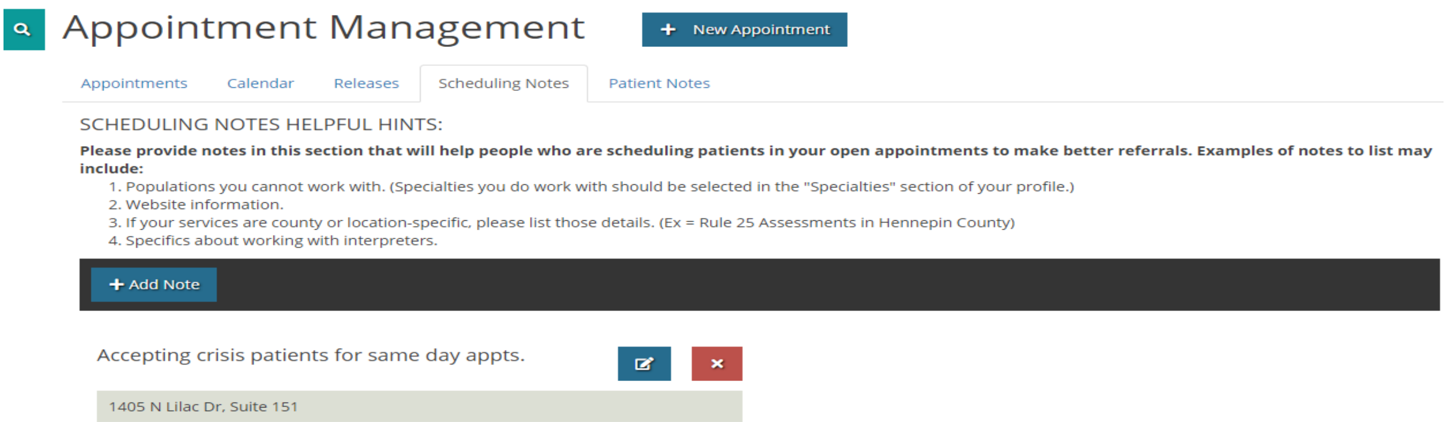
“Supervised Provider Name” is supervised by “Licensed Provider Name.” For teletherapy appts: Include patient's email AND phone number for contact info. For clients under 18: <12: The first session is with just the parent/guardian 12-15: Prefer the first session to be with just parent/guardian 16-18: Best if both the parent(s)/guardian(s)and child/adolescent are present. **Parent/Guardian must be present to review paperwork with clinician**

<u>Scheduling Notes:</u>

Hello, we are now offering Telehealth appointments. Please make sure patient has a device (smartphone, tablet, computer, etc.) that can handle video calls. Once patient is put on schedule, ask them to complete New Patient Form by using following link: “Website Link.” Please avoid same day appointments and schedule at least 48 hours ahead of time . Also please note that we only see MN residents .

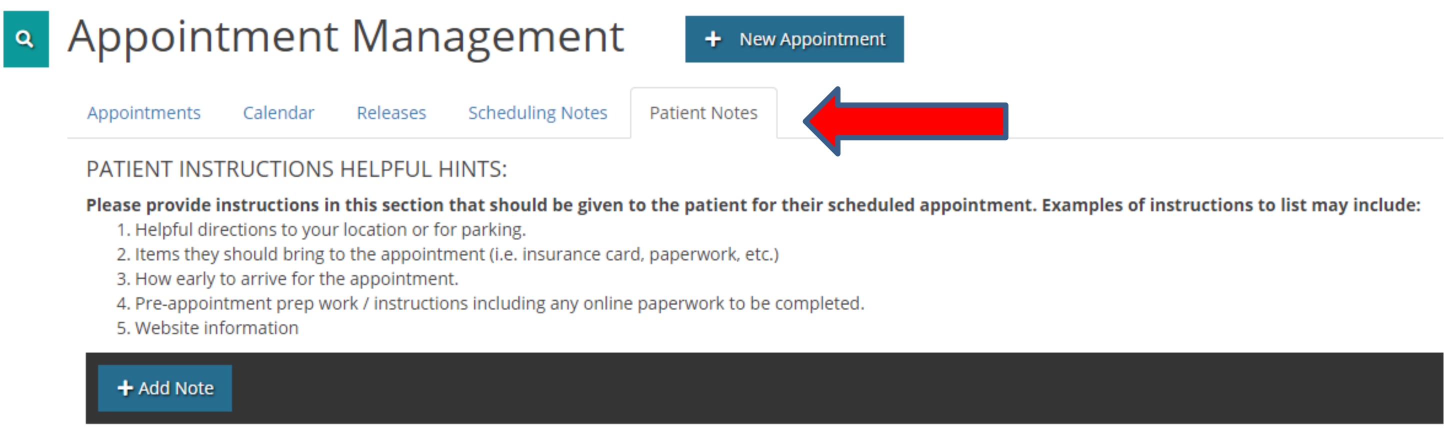
To add a Scheduling Note, click on the “+ Add Note” button. Select the location(s) the note applies to and type in the comment box. Note that you can expand the comment box by clicking and dragging on the lower right-hand corner of the box.

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



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.



Below are examples of best practices for Patient Notes when offering appointments on SchedulR:

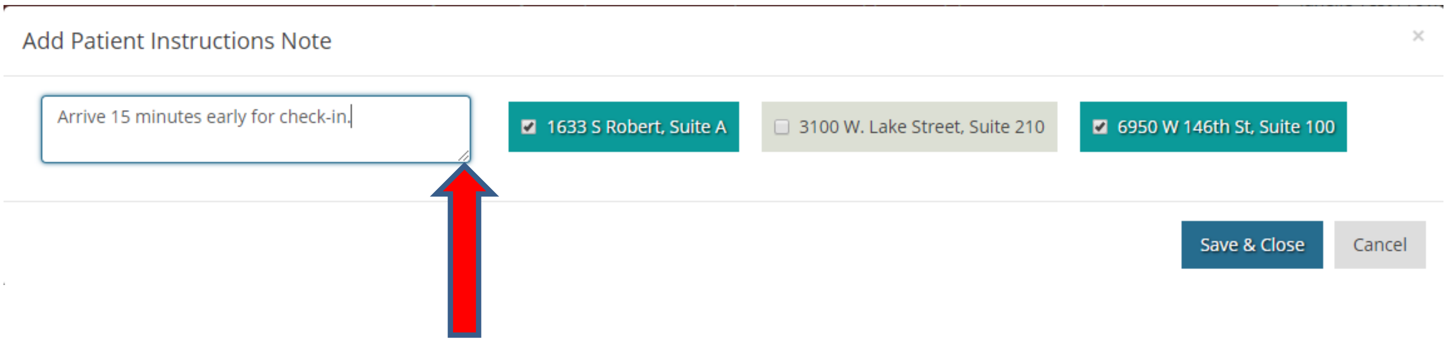
<u>Patient Notes:</u>

For all appointments: you will be sent information to fill out the intake paperwork online. Please complete required paperwork prior to your appointment. For telehealth appointments: you will also be sent a link to attend the appointment remotely.

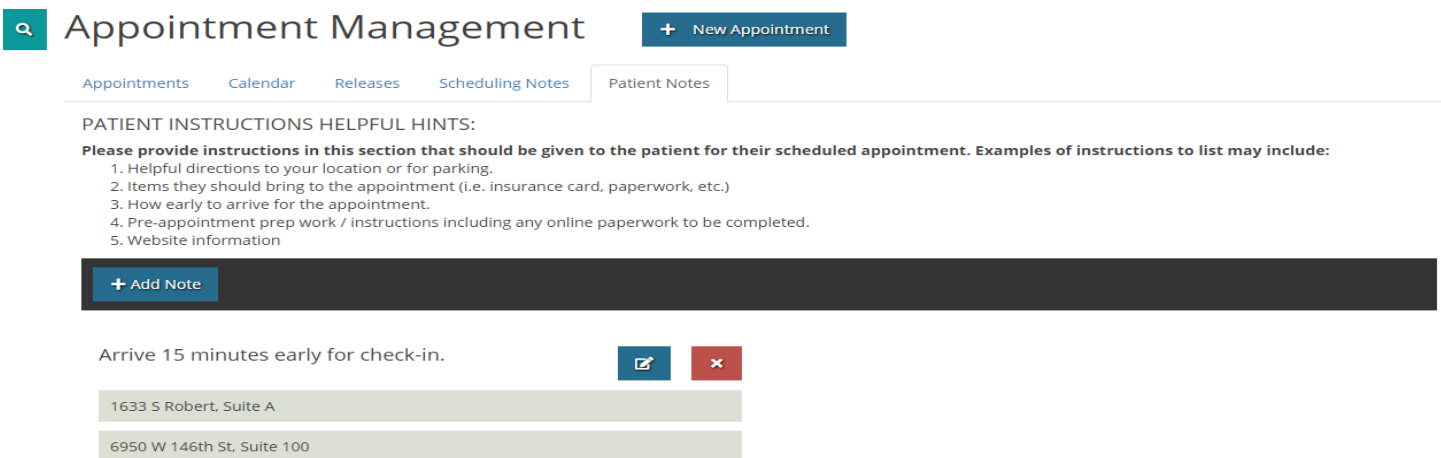
<u>Patient Notes:</u>

Please complete New Patient Form by using following link: “Website Link.” All forms need to be completed 24 hours prior to the appointment date/time by going to “Website Link” Please call us on “Phone Number” 24 hours prior to your scheduled appointment to confirm that you plan to attend. We will provide you information about how to log into video call when you call.

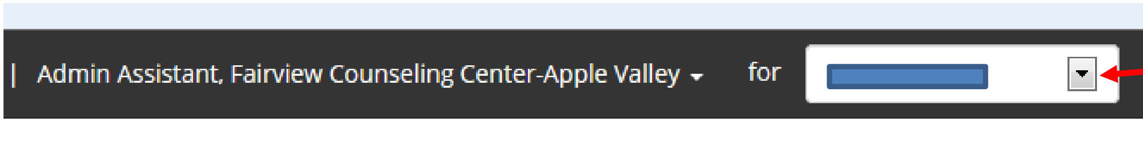
Click on the "+Add Note" button and then select the location(s) the note applies to. Create your Patient Note in the comment box. Again, you can expand the view of the comment box by clicking and dragging on the lower right-hand corner of the box.



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



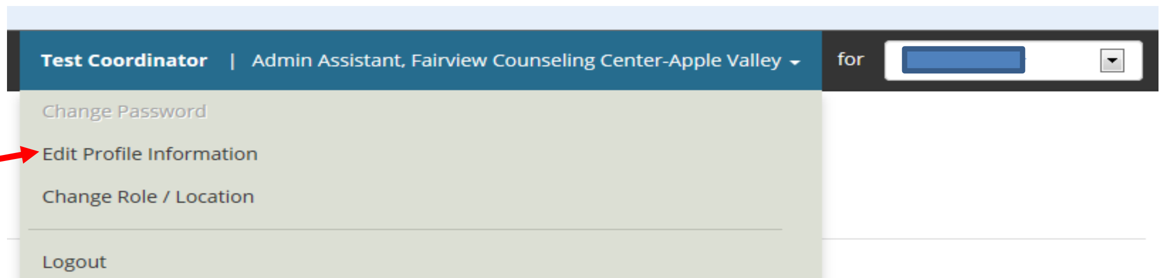
How to Edit a Provider's Profile Information

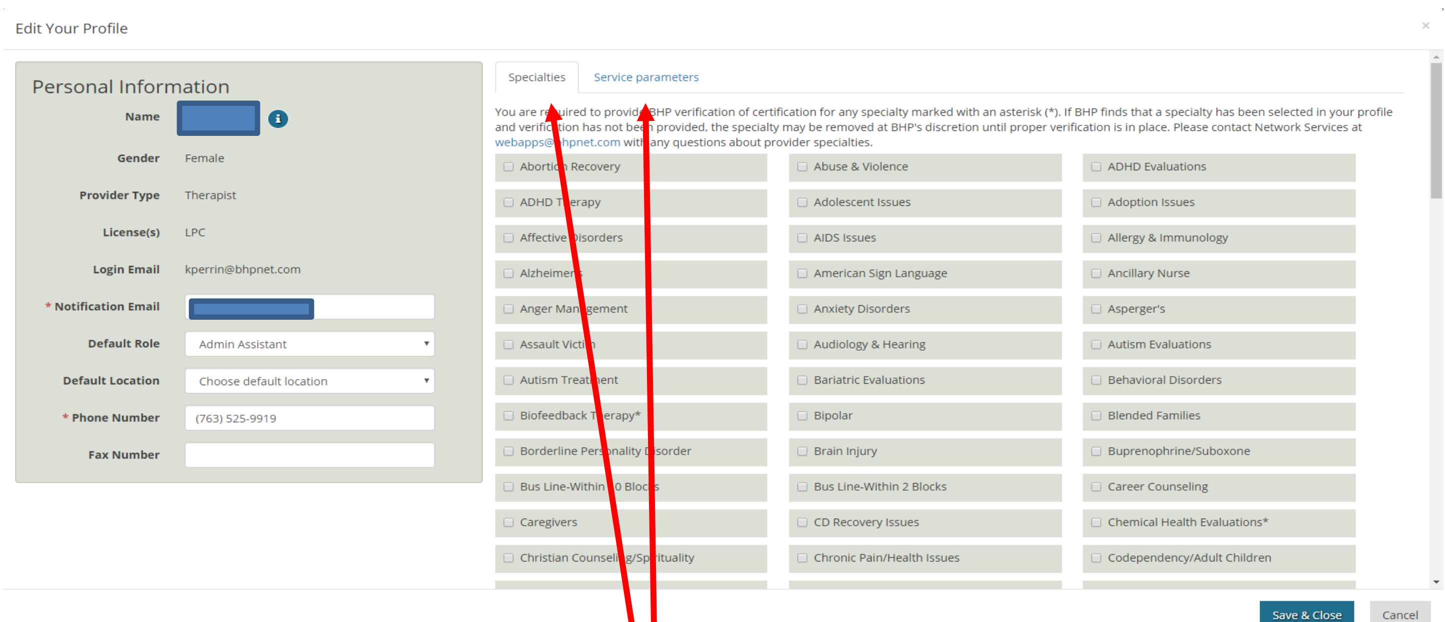


Choose the Provider at the top of your dashboard

*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.

Click "Edit Profile Information" under this drop down





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: janesmith@yourclinic.com; bobsmith@yourclinic.com; etc

Appointments

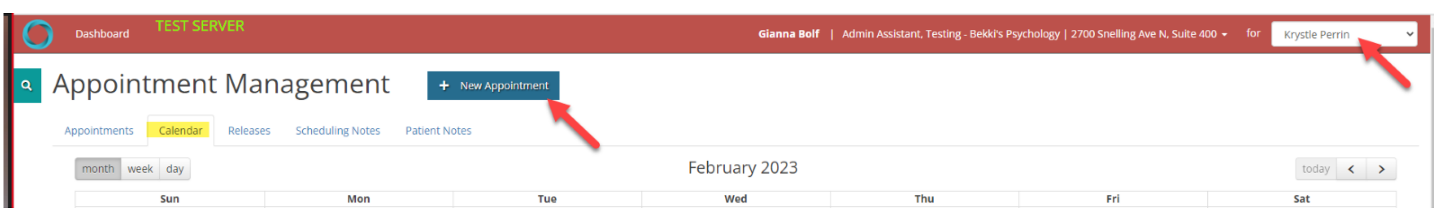
NOTE: Provider appointments will not be filled until the "Service Parameters" are completed and Specialties are added. This ensures clinically appropriate referrals

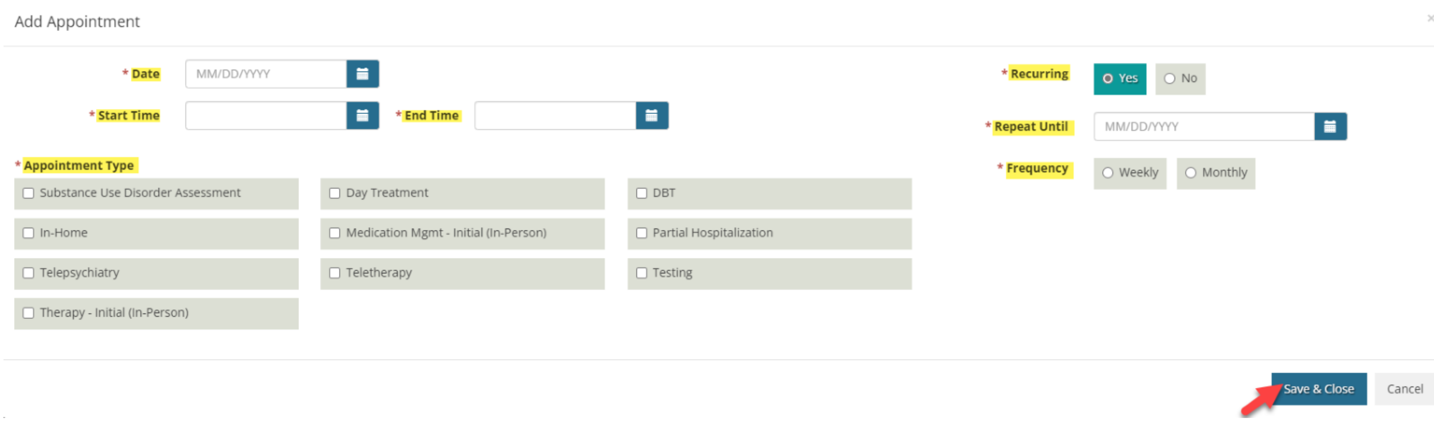
Who Can I add an Appointment for?

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:

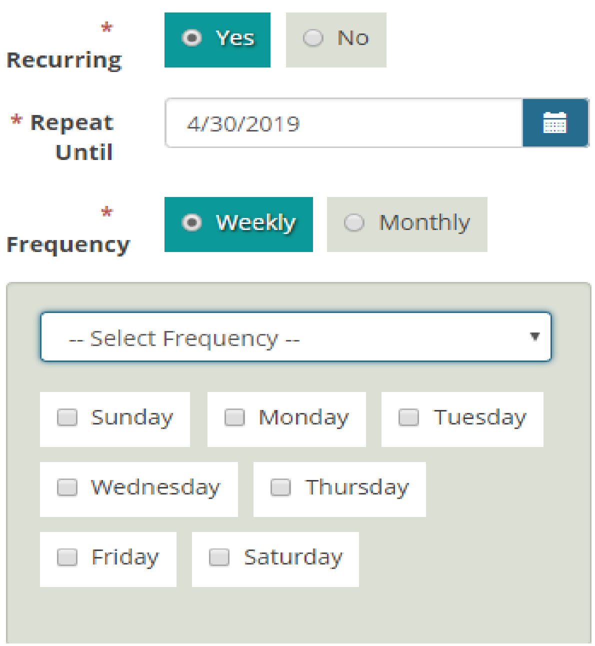




Be sure to fill in all required options, labeled with an asterisk "*" symbol. Select the date that you wish to add an appointment, followed by the appointment's start and end time. If your clinic has more than one location, be sure to choose the correct location in which you wish to offer this appointment. 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."

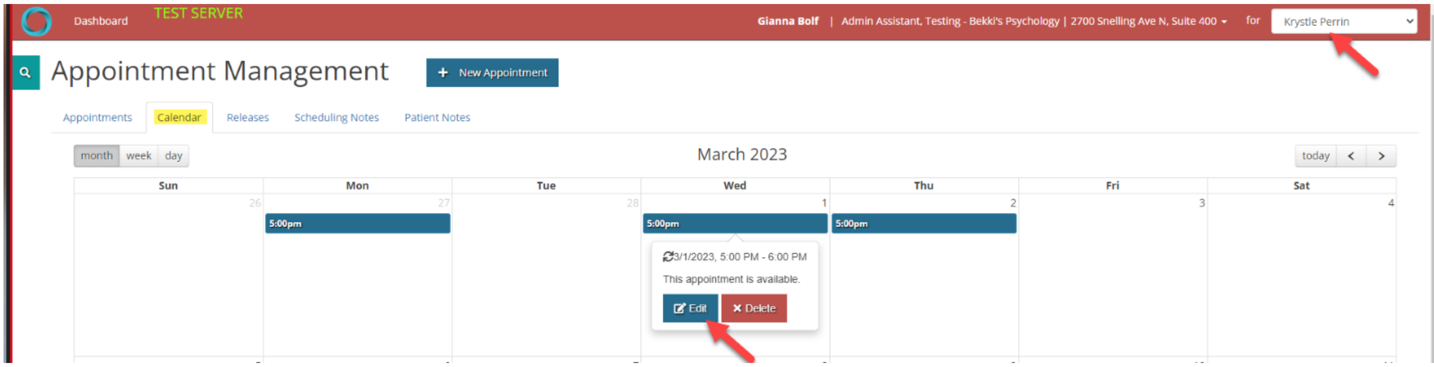
Recurring Appointments

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



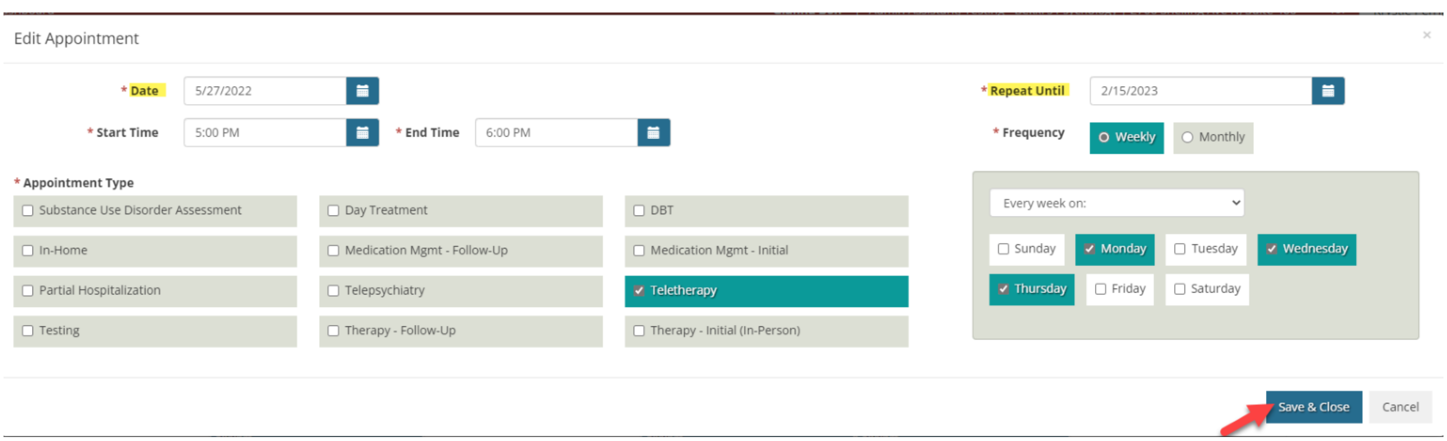
Removing Recurring Appointments

1. Select the recurring appointment that needs to be removed; Click "Edit"



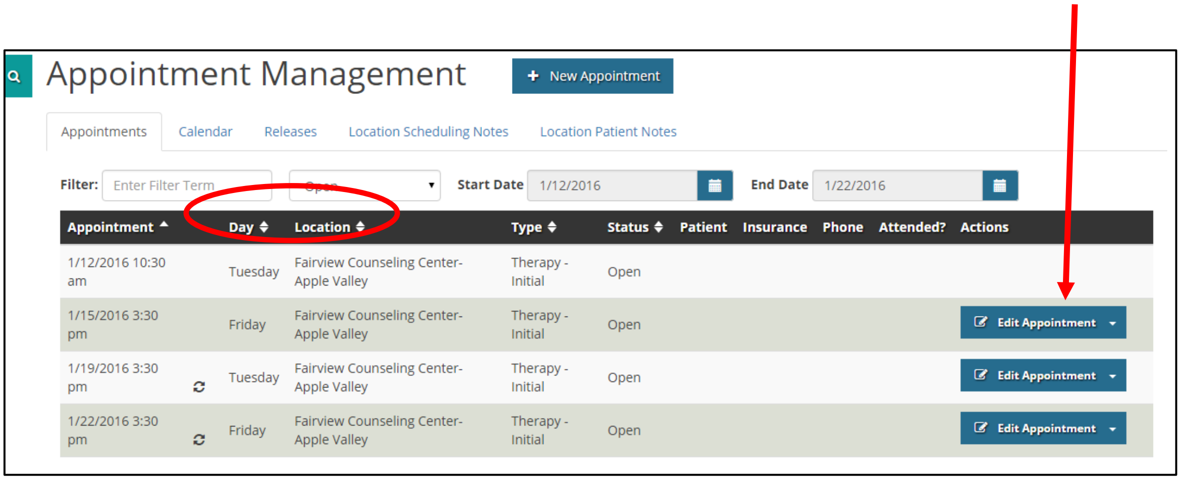
2. Click "Entire Series"

3. Change the appointment date to today's date in "Repeat Until"
4. Save & Close

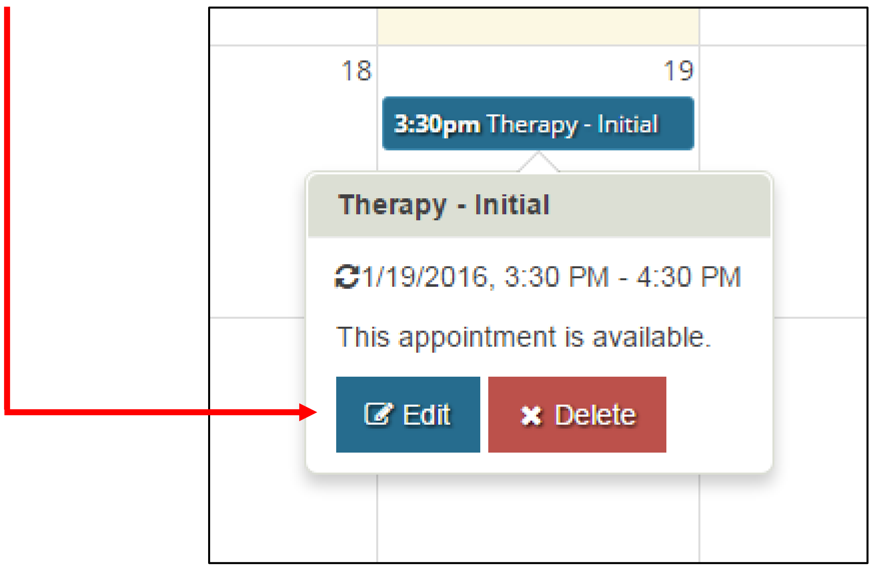


Editing an Open Appointment

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."



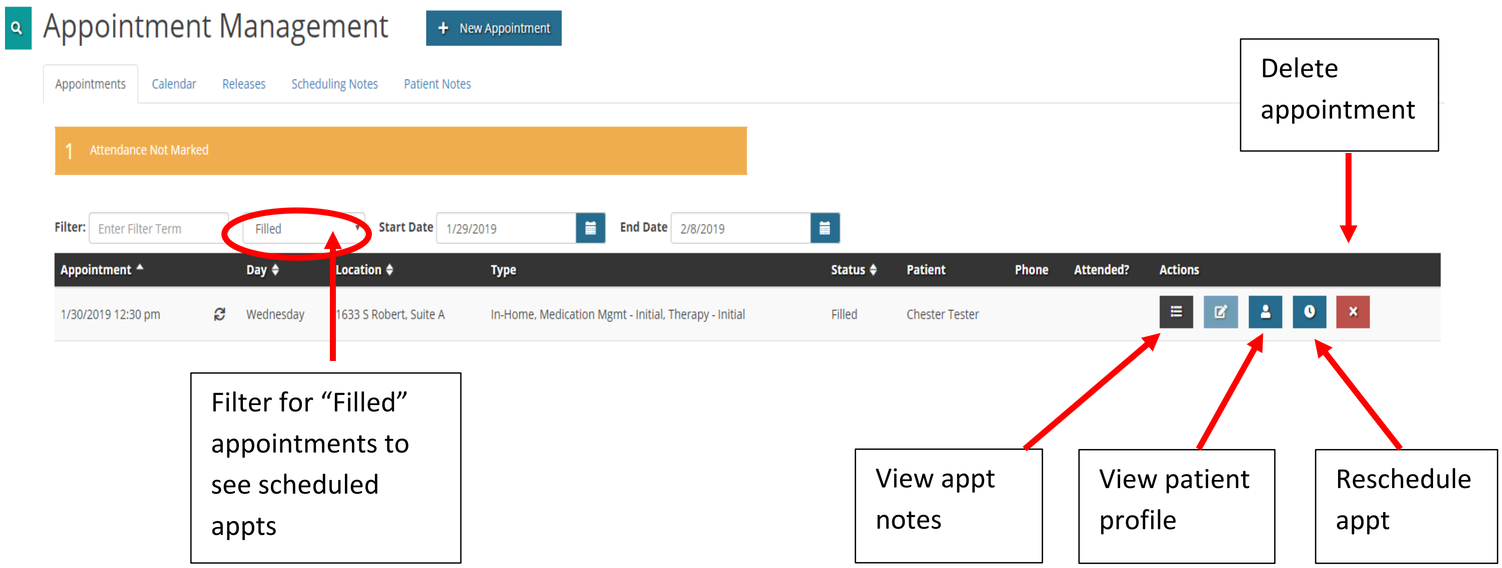
From the “Calendar” tab, you may change appointment attributes at any time by clicking on an appointment on the provider’s calendar and then choosing the “Edit” option.



** 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.

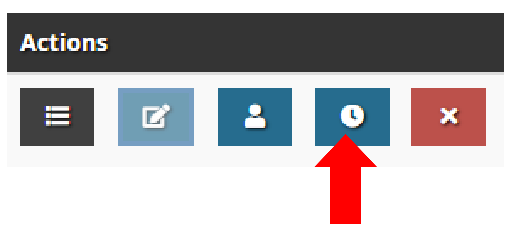
Editing a Scheduled Appointment

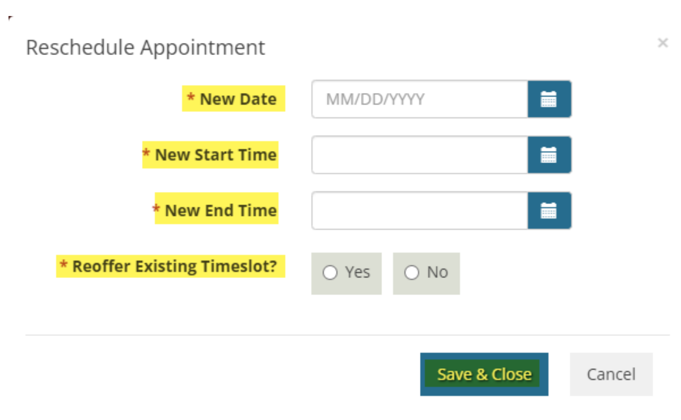
You may view all scheduled appointments by going to the “Appointments” page and filtering for “Filled” appointments. After the filled appointment(s) appear on the screen, you may view a brief summary of the appointment. This includes scheduled time, day, location (if more than one clinic location), type 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.



Rescheduling an Appointment

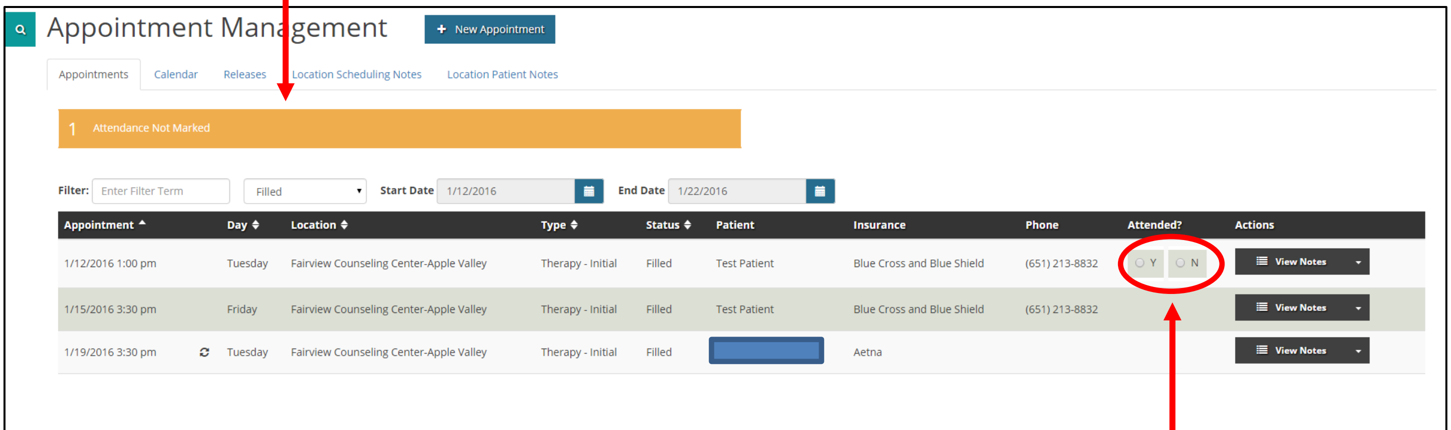
1. In the upper right-hand box, select the provider that the appointment was originally scheduled with.
2. From the “Appointments” tab, locate the appointment that needs to be rescheduled, then select the icon with a clock which will allow you to reschedule the appointment. You can only change appointment attributes for a scheduled appointment **<u>with the same provider</u>**.
3. Enter the updated appointment information; If you would like the appointment that you are rescheduling to become available on SchedulR, select “Yes” for “Reoffer Existing Timeslot.”
4. 4. 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”



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.

When to select Yes:

- When the patient attends the appointment

When to select No:

- If a patient No Shows an appointment, please mark "No" in the attendance column in Care Connect. In this instance, you will NOT need to cancel 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.

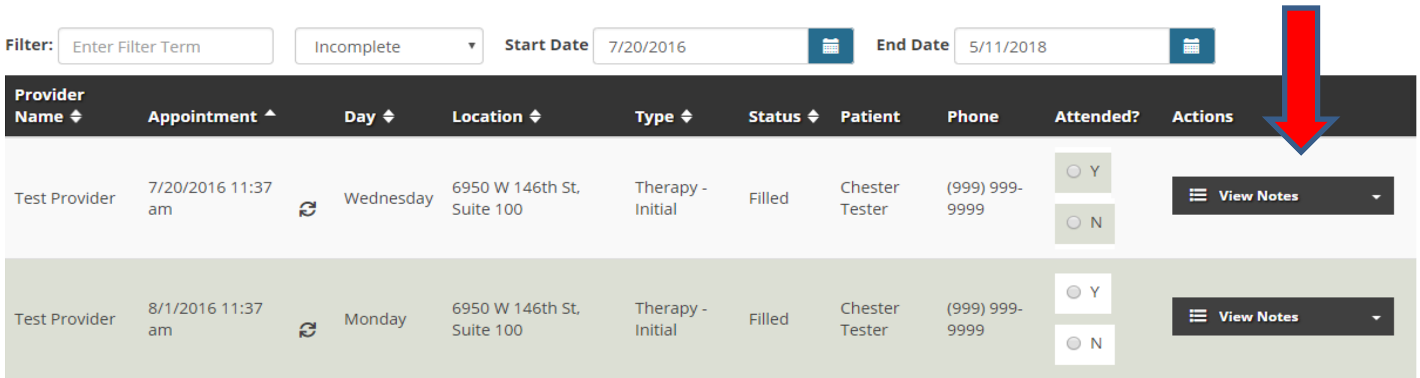
Patient Canceled- Remove Patient & Keep Appointment Open: If patient contacts provider or scheduling team to cancel the appointment. Appointment will be canceled for existing patient and appointment will become available in SchedulR

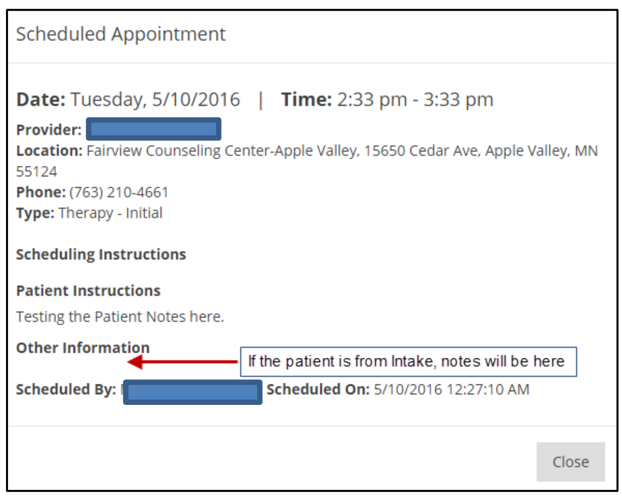
Provider Canceled- Remove Patient & Keep Appointment Open: If the patient does not complete necessary steps prior to appointment or any other reason provider would see fit to cancel appointment. Appointment will be canceled for existing patient and appointment will become available in SchedulR

Delete Appointment From Schedule: Appointment will be removed from SchedulR

View Notes Section

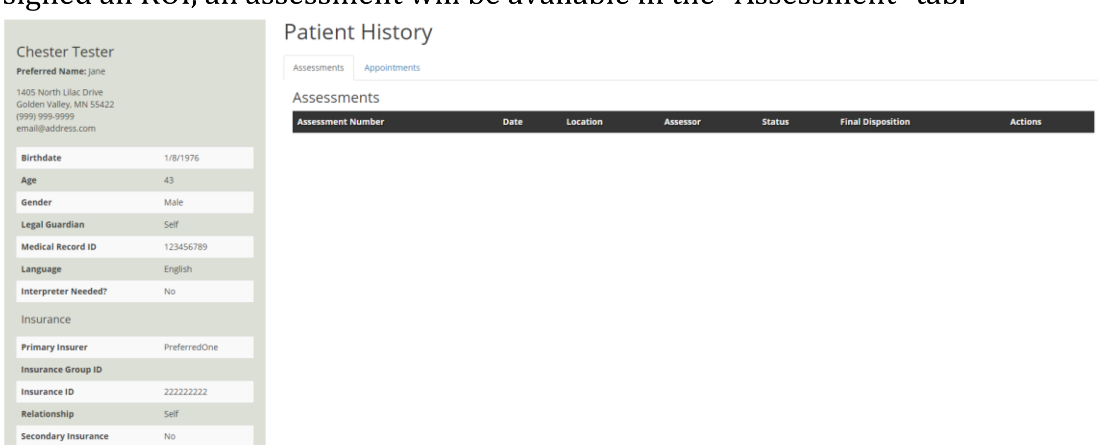
By clicking the “View Notes” section, a pop-up box will show up with brief appointment notes. If the patient was scheduled by the Intake Department, any pertinent patient information, such as reason for referral and current medications, will show up in the “Other Information” section.





View Profile Section

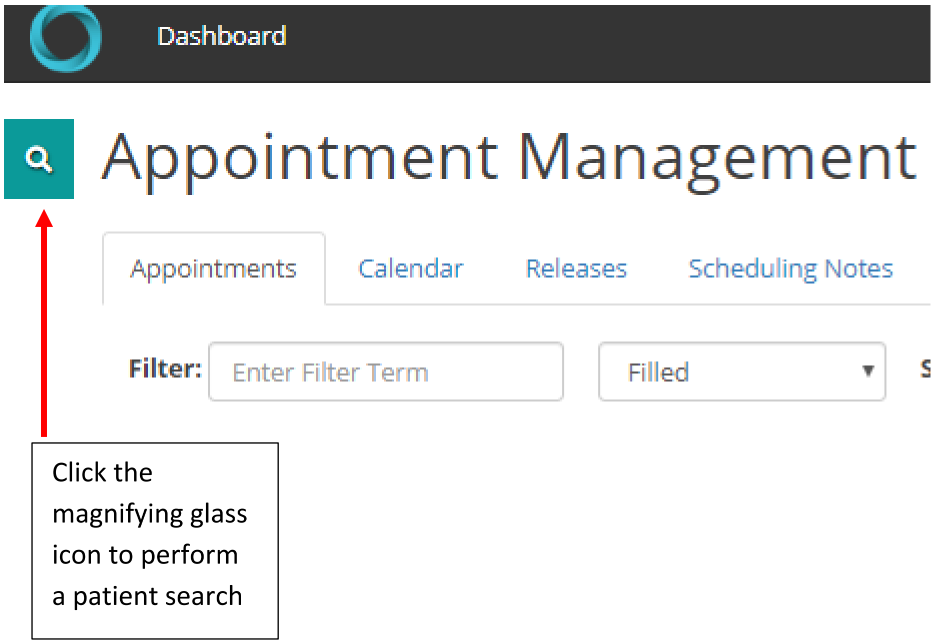
By clicking the “View Profile” section, a pop-up box will show up with detailed patient notes, such as name, DOB, legal guardian (if applicable), and insurance information. If the patient was scheduled from the DEC and signed an ROI, an assessment will be available in the “Assessment” tab.



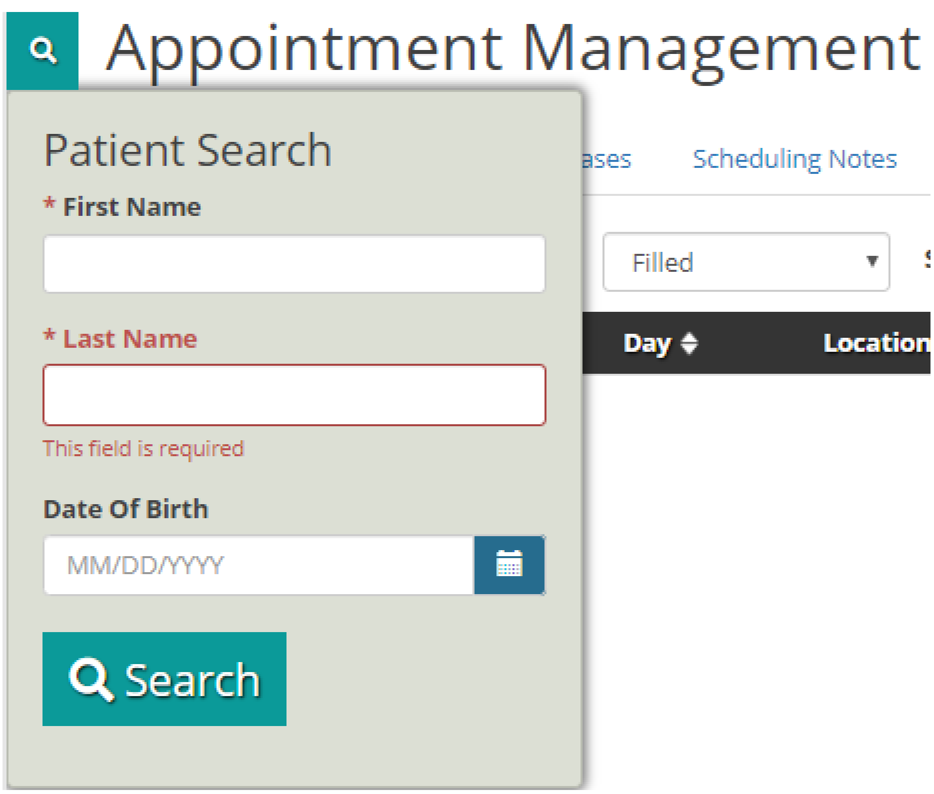
Assessments

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.



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

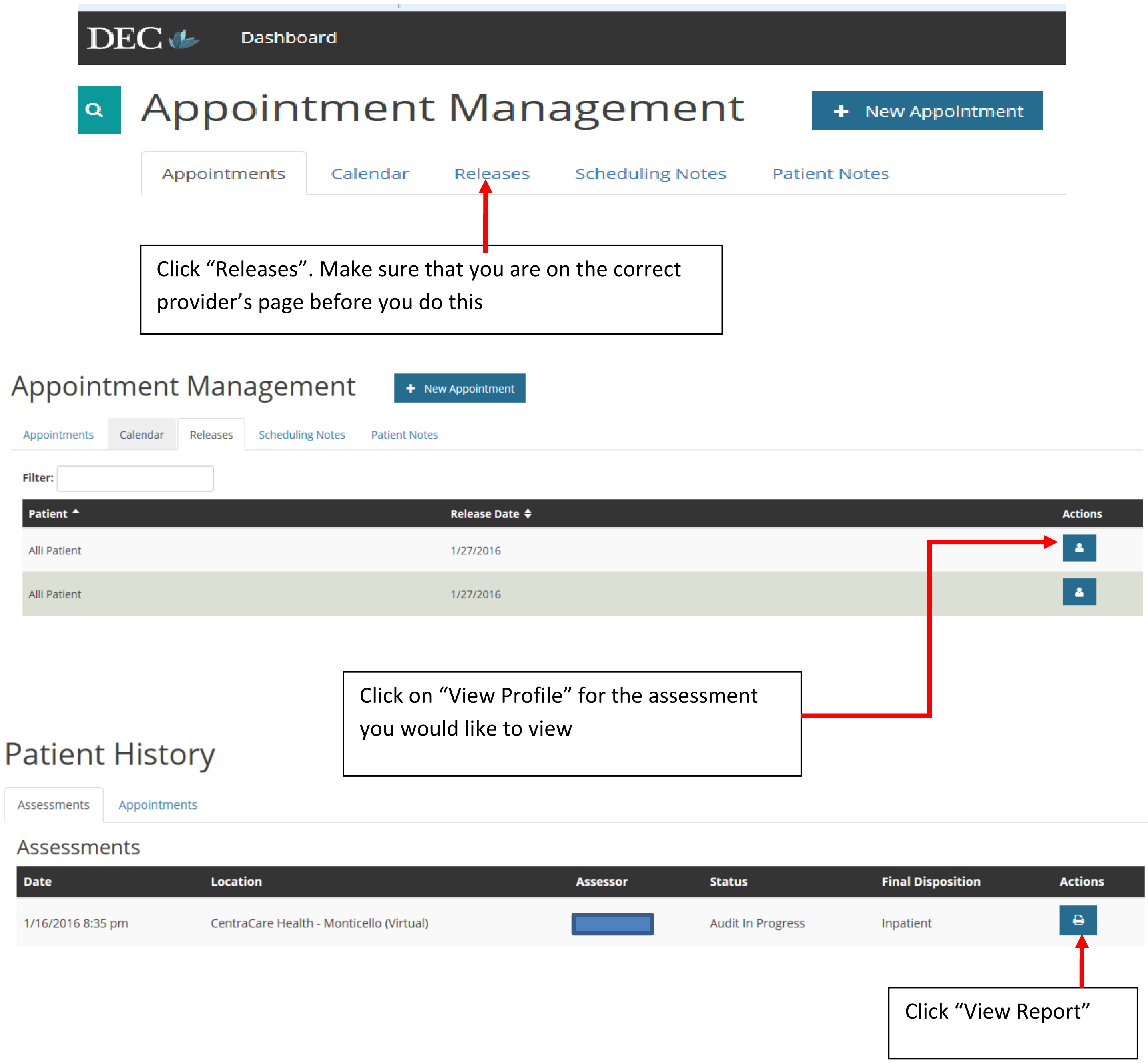


Releases

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. Not all patients will have an assessment appear in Care Connect.

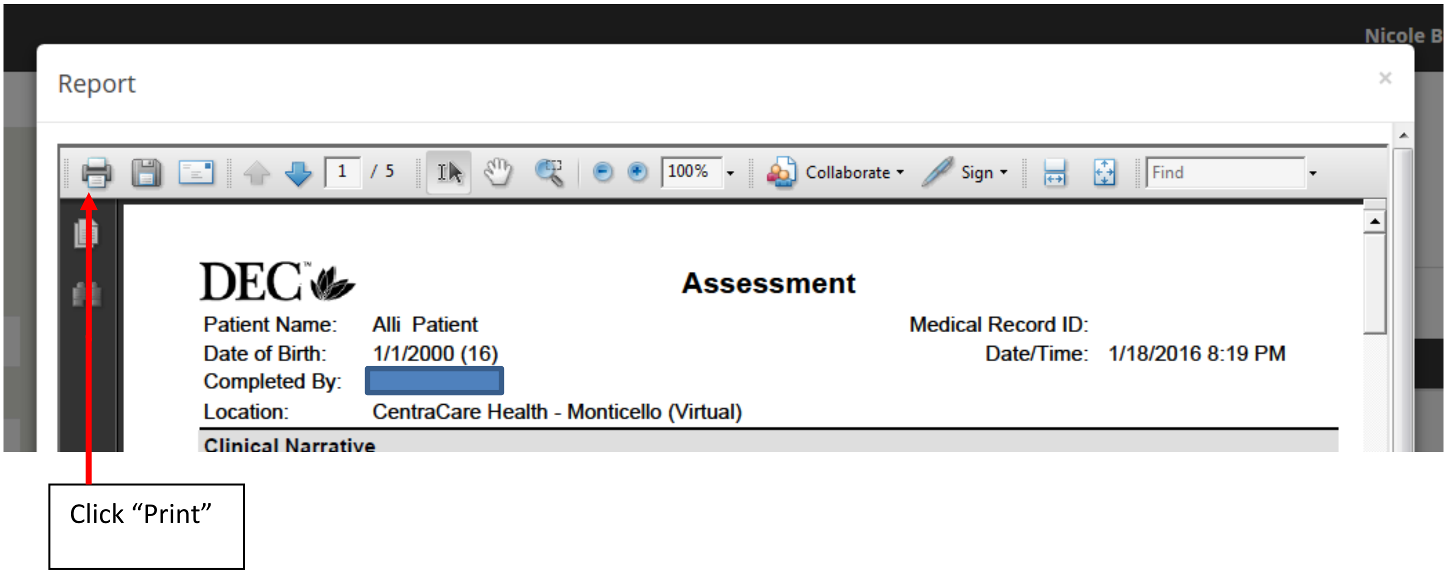
Viewing an Assessment

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



Printing an Assessment

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



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 dept-nservices@fairview.org to obtain a SAF .

Who do I contact with technical issues or SchedulR questions?

For any SchedulR-related questions, please email dept-nservices@fairview.org

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 Referral Network provider and offering appointments through SchedulR. Please submit a Systems Access Form to request access.

To add fully licensed providers, contact Network Services at dept-nservices@fairview.org to obtain information on how to request an application.

How do I add or remove a practice location?

Email dept-nservices@fairview.org to initiate any location change requests.