



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.

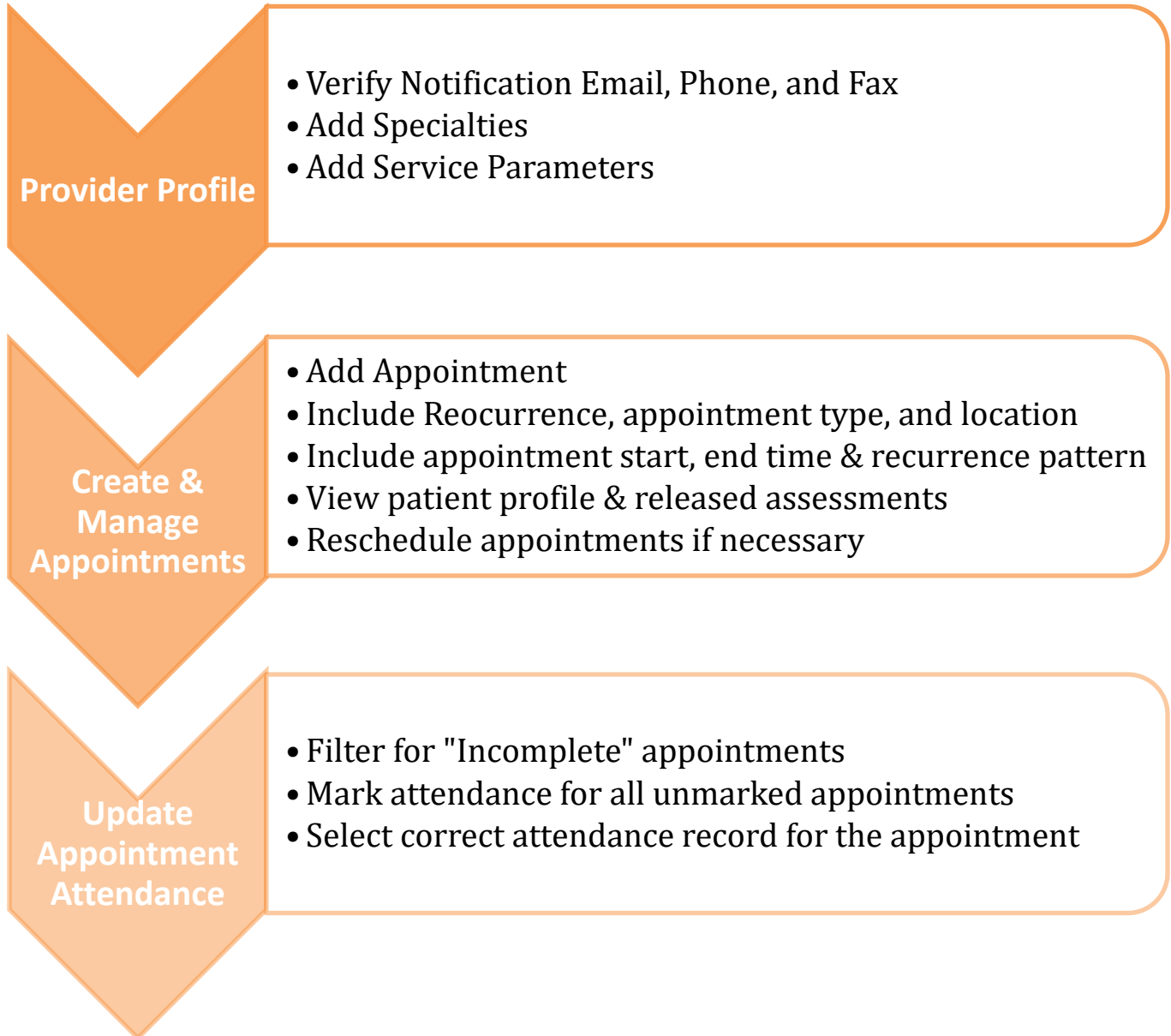
ASSESSMENT - A crisis behavioral assessment completed by a DEC Assessor.

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@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!



*****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	<input type="text"/>
Login Email	<input type="text"/>
* Notification Email	<input type="text"/>
Default Role	<input type="text" value="Choose default role"/>
* Phone Number	<input type="text"/>
Fax Number	<input type="text"/>
* Gender Identity	<input type="text" value="Female"/>

End User License Agreement

☐ I have read and agree to the [End User License Agreement](#)

Password

<input type="password"/>
<input type="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!

Gender Identity Information

* Do You Treat Female?	<input type="radio"/> Yes	<input type="radio"/> No
* Do You Treat Male?	<input type="radio"/> Yes	<input type="radio"/> No
* Do You Treat Gender Non-Conforming?	<input type="radio"/> Yes	<input type="radio"/> No
* Do You Treat Gender Non-Binary?	<input type="radio"/> Yes	<input type="radio"/> No
* Do You Treat Transgender Female?	<input type="radio"/> Yes	<input type="radio"/> No
* Do You Treat Transgender Male?	<input type="radio"/> Yes	<input type="radio"/> No
* Do You Treat Other?	<input type="radio"/> Yes	<input type="radio"/> No
* Do You Treat Prefer Not To Answer?	<input type="radio"/> Yes	<input type="radio"/> No

Sex Assigned At Birth

* Do You Treat Males?	<input type="radio"/> Yes	<input type="radio"/> No
* Do You Treat Females?	<input type="radio"/> Yes	<input type="radio"/> No

Other Parameters

* Insurance Accepted	<input type="checkbox"/> Active Insurance - Patient Wants To Be Self-Pay	<input type="checkbox"/> Aetna	<input type="checkbox"/> America's PPO
	<input type="checkbox"/> Blue Cross Blue Shield	<input type="checkbox"/> Cigna - HP	<input type="checkbox"/> Health Partners
	<input type="checkbox"/> Hennepin Health (MHP)	<input type="checkbox"/> Humana	<input type="checkbox"/> LaborCare UnitedHealthcare - UBH
	<input type="checkbox"/> Medica - UBH	<input type="checkbox"/> Medical Assistance - MN Medicaid	<input type="checkbox"/> Medicare
	<input type="checkbox"/> NOT BILLABLE - Blue Cross Blue Shield	<input type="checkbox"/> NOT BILLABLE - Health Partners	<input type="checkbox"/> NOT BILLABLE - Medical Assistance
	<input type="checkbox"/> NOT BILLABLE - PreferredOne	<input type="checkbox"/> NOT BILLABLE - UBH (Medica & LaborCare)	<input type="checkbox"/> NOT BILLABLE - UCare
	<input type="checkbox"/> PENDING - Medical Assistance	<input type="checkbox"/> PreferredOne	<input type="checkbox"/> PrimeWest Health
	<input type="checkbox"/> SelectCare - UBH	<input type="checkbox"/> Self-Pay	<input type="checkbox"/> South Country Health Alliance
	<input type="checkbox"/> Tricare	<input type="checkbox"/> UCare	<input type="checkbox"/> United Healthcare
	<input type="checkbox"/> Value Options	<input type="checkbox"/> WI Medicaid	<input type="checkbox"/> Wilderness Health ACO
	* Specialties	Specialties	
	* Are You Accepting New Patients?	<input type="radio"/> Yes <input type="radio"/> 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.

Specialties

☐ Abortion Concerns

☐ ADHD Treatment

☐ Alzheimer's/Dementia

☐ Anxiety Disorders

☐ Appointment Type - Telepsychiatry

☐ Autism Spectrum Disorder Treatment

☐ Biofeedback Therapy

☐ Bullying

☐ Bus Line-Within 2 Blocks

☐ Children With Problematic Sexual Behavior

☐ Chronic Pain/Health Issues

☐ Cognitive Behavioral Therapy For Insomnia (CBTI)

☐ Court Ordered Therapy

☐ Depression

☐ Domestic Abuse Perpetrator

☐ Emotionally Focused Couples Therapy

☐ Family Conflict

☐ Acceptance And Commitment Therapy

☐ Adjustment Disorders

☐ American Sign Language

☐ Applied Behavioral Analysis (ABA) Therapy

☐ Appointment Type - Teletherapy

☐ Bariatric Evaluations

☐ Bipolar Disorders

☐ Buprenorphine/Suboxone Treatment

☐ Career Counseling

☐ Children's Therapeutic Support Services (CTSS)

☐ Codependency

☐ Conduct Disorder

☐ DBT Certified

☐ Developmental Disabilities

☐ Domestic Abuse Victims

☐ Eye Movement Desensitization & Reprocess (EMDR)

☐ Family Therapy

☐ ADHD Testing

☐ Adoption Concerns

☐ Anger Management

☐ Appointment Type - Individual Therapy

☐ Autism Spectrum Disorder Evaluations

☐ Behavioral Concerns In Children

☐ Borderline Personality Disorder

☐ Bus Line-Within 10 Blocks

☐ Caregiver Concerns

☐ Christian Counseling

☐ Cognitive Behavioral Therapy (CBT)

☐ Co-Occuring Mental Health And Substance Use

☐ DBT Skills

☐ Dissociative Disorders

☐ Eating Disorders

☐ Facility Based Substance Use Disorder Treatment

☐ Fetal Alcohol Syndrome (FAS)

Ok

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.bhpn.net>. This link may be used anytime you have locked your account or forgotten your password.



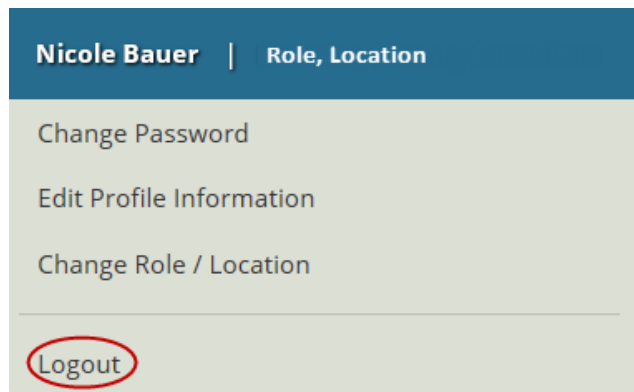
Care Connect Login

Welcome to Behavioral Healthcare Providers! Please log in.

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.

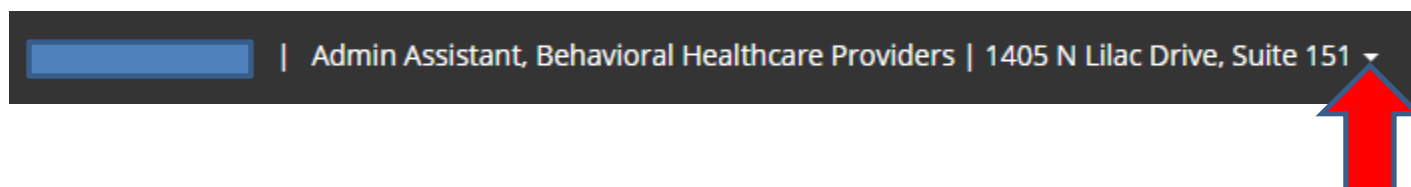
You may reference "[How to Edit a Provider's Profile Information](#)" and "[Appointments](#)" in the table of contents page for more information about how to complete these tasks.

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

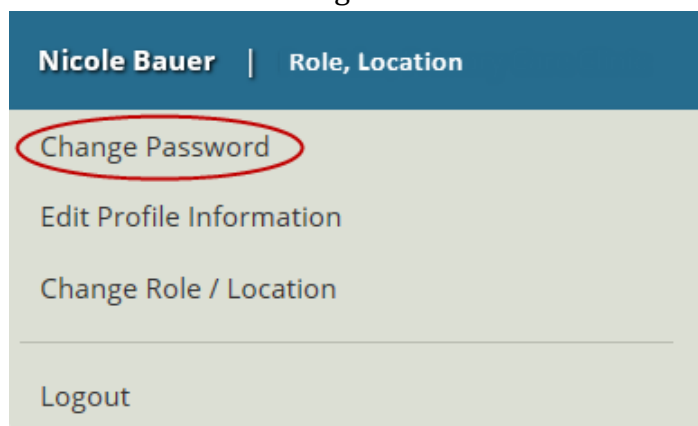
To Access your Personal Account Settings

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

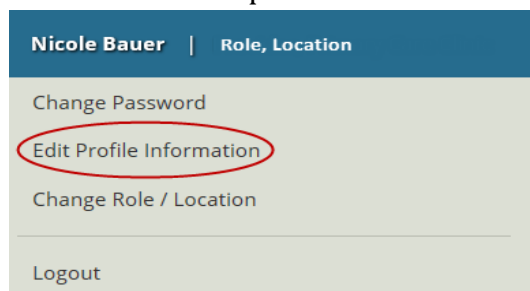
You may change your account password at any time by selecting “Change Password” located in your Personal Account Settings:



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.

Select Role / Location

* Current Role	Admin Assistant	▼
* Current Network	TEST CLINIC	▼
* Current Location	TEST CLINIC- Apple Valley 6950 W 146th St, Suite 100	
	TEST CLINIC- Apple Valley 6950 W 146th St, Suite 100	
	TEST CLINIC-Minneapolis 3100 W. Lake Street, Suite 210	
	TEST CLINIC-West St Paul 1633 S Robert, Suite A	

Cancel

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"

Janelle Esquilin | Admin Assistant, TEST CLINIC-

- Change Password
- Edit Profile Information
- Change Role / Location
- Logout

Dashboard Orientation

The screenshot shows the 'Appointment Management' dashboard. At the top, a dark navigation bar contains a 'Dashboard' link, a search bar, and user information: 'Admin Assistant | Testing - Bekki's Psychology | 1405 N Lilac Dr, Suite 151'. Below this is a teal header with a magnifying glass icon, the title 'Appointment Management', and a '+ New Appointment' button. The main content area has tabs for 'Appointments', 'Calendar', 'Releases', 'Scheduling Notes', and 'Patient Notes'. A filter section includes a text input 'Filter: Enter Filter Term', a 'Filled' status dropdown, 'Start Date' (1/30/2019) with a calendar icon, and 'End Date' (2/9/2019) with a calendar icon. Below the filters is a table with columns: Appointment, Day, Location, Type, Status, Patient, Phone, Attended?, and Actions. Callout boxes provide instructions: 1. Top left: 'Click to return to the main Dashboard.' points to the 'Dashboard' link. 2. Top middle: 'Click to add a new appointment to schedule.' points to the '+ New Appointment' button. 3. Top right: 'Click to edit profile and account settings.' points to the user name. 4. Far top right: 'Click to change the provider.' points to the location dropdown. 5. Bottom left: 'Perform a "Patient Search" by clicking this icon' points to the magnifying glass icon. 6. Bottom middle: 'Drop-down menu to view All Appointments, Filled, Open, or Incomplete' points to the status dropdown. 7. Bottom right: '***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.' points to the 'End Date' field.

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 | Admin Assistant | Testing - Bekki's Psychology | 1405 N Lilac Dr, Suite 151 | for

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

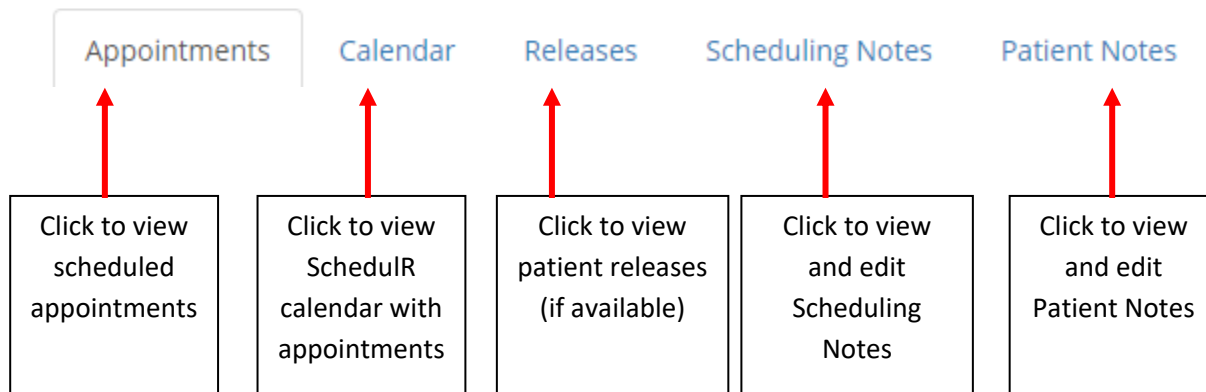
***The system will default to "Filled" Appointment settings. Click the box to change the category.

***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

Appointment Management

+ New Appointment



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

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

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

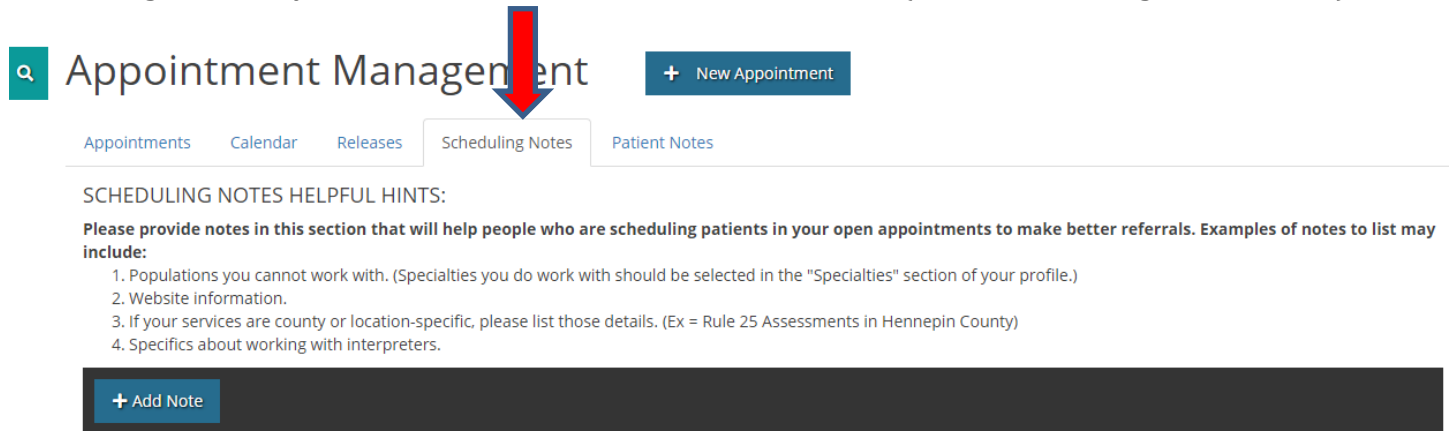
ScheduR Calendar

The screenshot shows the ScheduR Calendar interface for January 2016. The interface includes a header with the DEC logo, a search bar, and a navigation bar with tabs: Appointments, Calendar, Releases, Location, Scheduling Notes, and Location Patient Notes. The main calendar area displays a grid of days with appointments listed. Annotations with red arrows point to various elements:

- Select desired calendar view:** Points to the "month" tab in the top left.
- Grey box = old appointment:** Points to a grey box labeled "3:30pm Therapy - Initial" on Tuesday, January 4th.
- Click to add a new appointment to schedule:** Points to the "+ New Appointment" button in the top right.
- Click to change which provider is being viewed:** Points to a dropdown menu in the top right.
- Yellow box = current day:** Points to a yellow box labeled "10:30am Therapy - Initial" on Tuesday, January 11th.
- Blue = current or future appointment:** Points to a blue box labeled "3:30pm Therapy - Initial" on Friday, January 15th.
- Toggle month/day/week. Click "today" to direct calendar to present day:** Points to the "today" button in the top right.

Scheduling Notes

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



The screenshot shows the 'Appointment Management' interface. At the top, there is a search icon and the title 'Appointment Management'. Below this is a navigation bar with tabs: 'Appointments', 'Calendar', 'Releases', 'Scheduling Notes' (which is highlighted), and 'Patient Notes'. To the right of the tabs is a '+ New Appointment' button. Below the navigation bar, there is a section titled 'SCHEDULING NOTES HELPFUL HINTS:'. This section contains a paragraph: '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:' followed by a numbered list: 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. Below the hints is a dark grey bar with a '+ Add Note' button. A large red arrow points from the 'Scheduling Notes' tab to the '+ Add Note' button.

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

Scheduling Notes:

"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**

Scheduling Notes:


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.



The screenshot shows the 'Add Scheduling Instructions Note' dialog box. It has a title bar with a close button (X). Inside, there is a text input field with the placeholder text 'Testing Scheduling Note'. Below the input field are three location selection buttons: '1633 S Robert, Suite A' (checked), '3100 W. Lake Street, Suite 210' (checked), and '6950 W 146th St, Suite 100' (unchecked). At the bottom right are 'Save & Close' and 'Cancel' buttons. A large red arrow points from the bottom of the page up to the '1633 S Robert, Suite A' button.

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

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

Patient Notes:

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.

Patient Notes:

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.

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

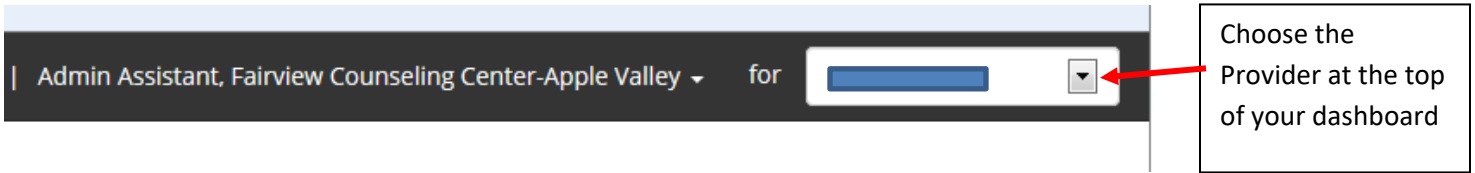
Arrive 15 minutes early for check-in.

1633 S Robert, Suite A

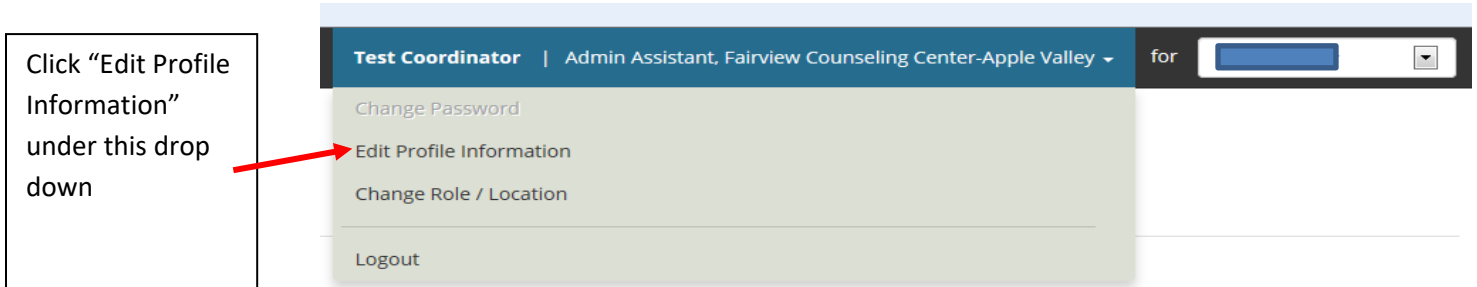
6950 W 146th St, Suite 100

Page | 13

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" form. The form is divided into two main sections: "Personal Information" and "Specialties / Service parameters". The "Personal Information" section includes fields for Name, Gender, Provider Type, License(s), Login Email, Notification Email, Default Role, Default Location, Phone Number, and Fax Number. The "Specialties / Service parameters" section includes a list of specialties with checkboxes for selection. A red arrow points to the "Specialties" tab, with a text box below that says "Each one of these tabs must be completed at set up and updated as needed." The form also has "Save & Close" and "Cancel" buttons at the bottom right.

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

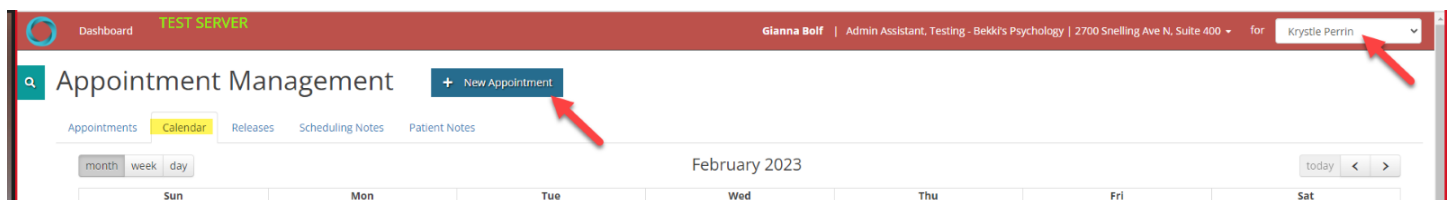
NOTE: Provider appointments will not be filled until the “Service Parameters” are completed and Specialties are added. This ensures clinically appropriate referrals


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:




* **Date** 

* **Start Time**  * **End Time** 


* **Appointment Type**

<input type="checkbox"/> Substance Use Disorder Assessment	<input type="checkbox"/> Day Treatment	<input type="checkbox"/> DBT
<input type="checkbox"/> In-Home	<input type="checkbox"/> Medication Mgmt - Initial (In-Person)	<input type="checkbox"/> Partial Hospitalization
<input type="checkbox"/> Telepsychiatry	<input type="checkbox"/> Teletherapy	<input type="checkbox"/> Testing
<input type="checkbox"/> Therapy - Initial (In-Person)		

* **Recurring** ☒ Yes ☐ No

* **Repeat Until** 

* **Frequency** ☐ Weekly ☐ Monthly


 **Save & Close**

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).

* **Recurring** ☒ Yes ☐ No

* **Repeat Until** 

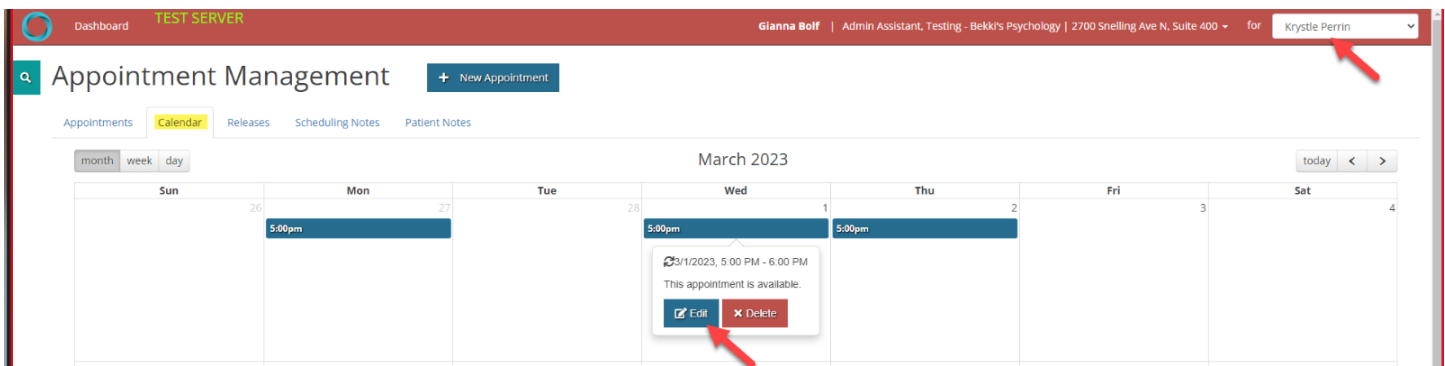
* **Frequency** ☒ Weekly ☐ Monthly

-- Select Frequency -- ▾

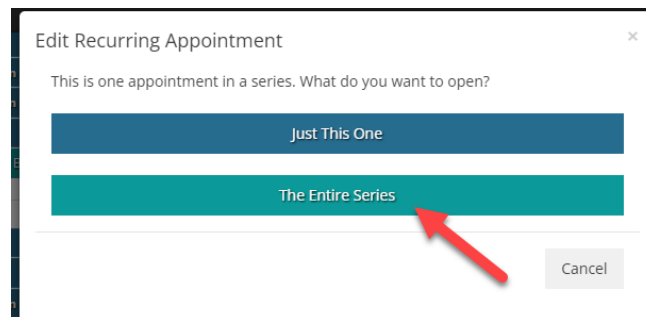
<input type="checkbox"/> Sunday	<input type="checkbox"/> Monday	<input type="checkbox"/> Tuesday
<input type="checkbox"/> Wednesday	<input type="checkbox"/> Thursday	
<input type="checkbox"/> Friday	<input type="checkbox"/> Saturday	

Removing Recurring Appointments

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



2. Click “Entire Series”



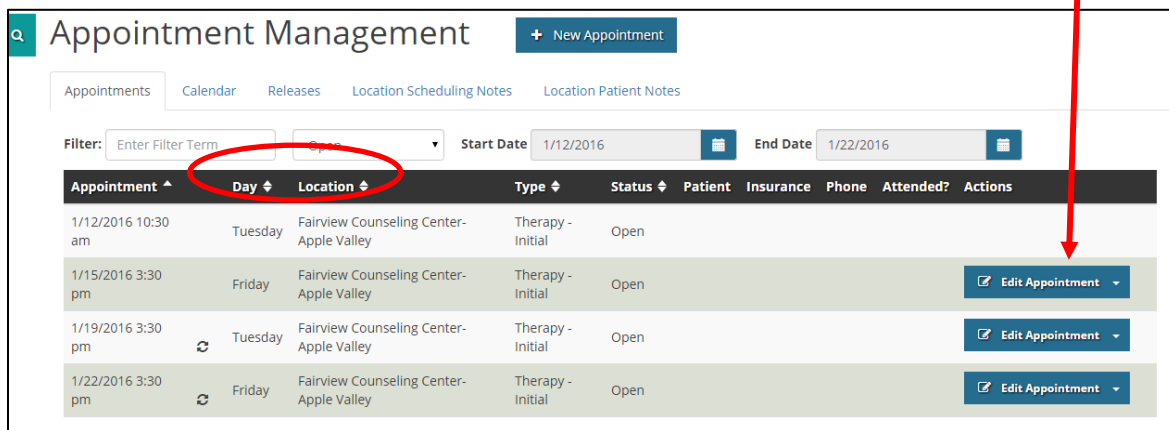
3. Change the appointment date to today's date in “Repeat Until”
4. Save & Close

The screenshot shows the 'Edit Appointment' form. It includes the following fields and options:

- Date:** 5/27/2022
- Start Time:** 5:00 PM
- End Time:** 6:00 PM
- Repeat Until:** 2/15/2023
- Frequency:** Weekly (selected), Monthly
- Appointment Type:** A grid of checkboxes for various appointment types. 'Teletherapy' is selected.
- Every week on:** A dropdown menu with options for days of the week. Monday, Wednesday, and Thursday are selected.
- Buttons:** 'Save & Close' and 'Cancel'. A red arrow points to the 'Save & Close' button.

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.”



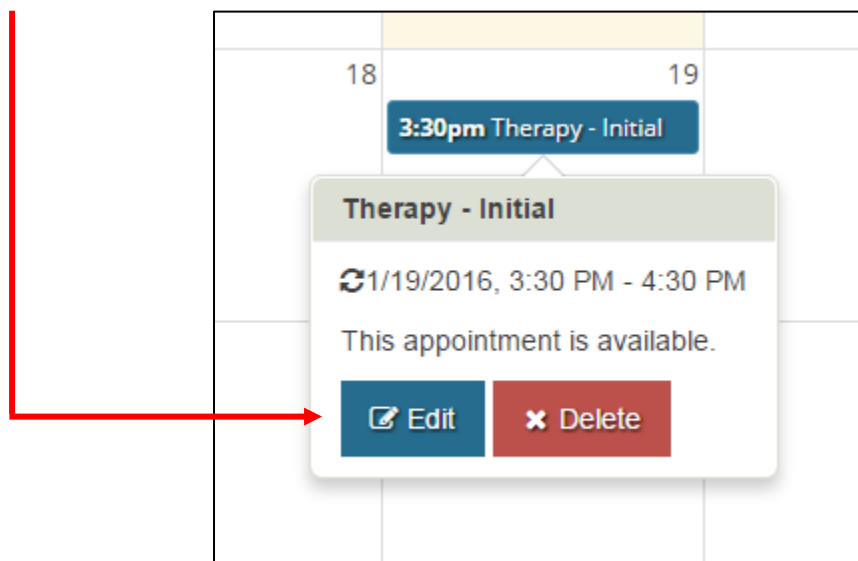
Appointment Management [+ New Appointment](#)

Appointments **Calendar** Releases Location Scheduling Notes Location Patient Notes

Filter: Start Date: 1/12/2016 End Date: 1/22/2016

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.



** 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.

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			

Filter for "Filled" appointments to see scheduled appts

Delete appointment

View appt notes

View patient profile

Reschedule appt

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 **with the same provider**.
3. Enter the updated appointment information; If you would like the appointment that you are rescheduling to become available on ScheduR, select "Yes" for "Reoffer Existing Timeslot."
4. Complete the fields and click "Save & Close". A second screen will appear to confirm you would like to reschedule the appointment.

Actions

Reschedule Appointment

* New Date

* New Start Time

* New End Time

* Reoffer Existing Timeslot? ☐ Yes ☐ No

Save & Close Cancel

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's a search bar and a '+ New Appointment' button. Below that 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 bar that says '1 Attendance Not Marked'. Below this is a filter section with 'Enter Filter Term', a 'Filled' dropdown, 'Start Date' (1/12/2016), and 'End Date' (1/22/2016). The main table has columns: Appointment, Day, Location, Type, Status, Patient, Insurance, Phone, Attended?, and Actions. The 'Attended?' column has radio buttons for 'Y' and 'N'. A red circle highlights the 'Y' and 'N' buttons for the first appointment, and a red arrow points to them from below. The 'Actions' column has a 'View Notes' button for each row.

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		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.

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.

Filter: Incomplete ▼ Start Date 📅 End Date 📅

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	<input type="radio"/> Y <input type="radio"/> N	☰ View Notes
Test Provider	8/1/2016 11:37 am	Monday	6950 W 146th St, Suite 100	Therapy - Initial	Filled	Chester Tester	(999) 999-9999	<input type="radio"/> Y <input type="radio"/> N	☰ View Notes

Scheduled Appointment

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

Provider: [REDACTED]

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: [REDACTED] **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.

Chester Tester

Preferred Name: Jane

1405 North Lilac Drive
Golden Valley, MN 55422
(999) 999-9999
email@address.com

Birthdate

1/8/1976

Age

43

Gender

Male

Legal Guardian

Self

Medical Record ID

123456789

Language

English

Interpreter Needed?

No

Insurance

Primary Insurer

PreferredOne

Insurance Group ID

Insurance ID

222222222

Relationship

Self

Secondary Insurance

No

Patient History

Assessments

Appointments

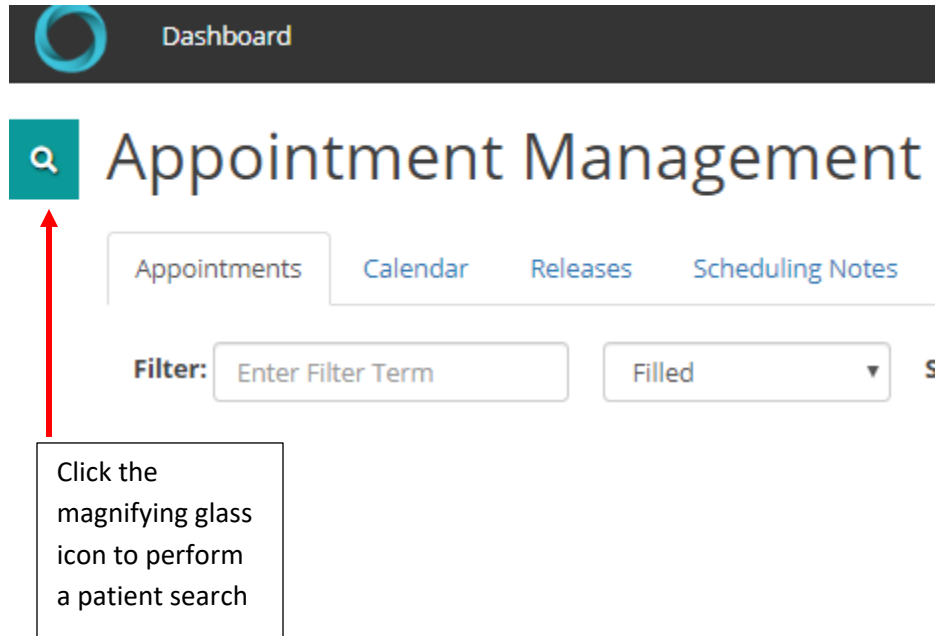
Assessments

Assessment Number	Date	Location	Assessor	Status	Final Disposition	Actions
-------------------	------	----------	----------	--------	-------------------	---------

Assessments

Patient Search

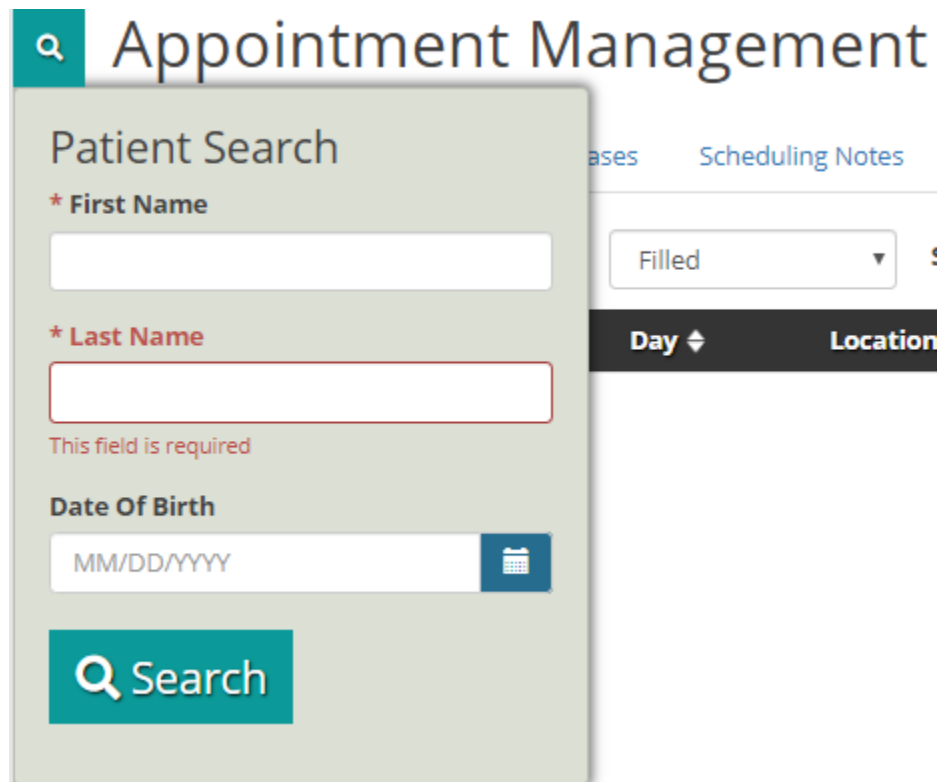
Patients that have signed a Release of Information (ROI) or that have been scheduled with an appointment in Care Connect will appear in the Patient Search tool.



The screenshot shows the top of the 'Appointment Management' dashboard. At the top is a dark header with a circular logo and the word 'Dashboard'. Below this is a teal square containing a white magnifying glass icon. To the right of the icon is the title 'Appointment Management'. Below the title are four tabs: 'Appointments', 'Calendar', 'Releases', and 'Scheduling Notes'. Further down is a 'Filter:' section with a text input field labeled 'Enter Filter Term' and a dropdown menu labeled 'Filled'. A red arrow points from a text box to the magnifying glass icon.

Click the magnifying glass icon to perform a patient search

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 a 'Patient Search' modal form overlaid on the dashboard. The form has a title 'Patient Search' and three required fields: '* First Name', '* Last Name', and 'Date Of Birth'. The 'Date Of Birth' field includes a calendar icon. At the bottom is a teal button with a magnifying glass icon and the word 'Search'.

Patient Search

* First Name

* Last Name

This field is required

Date Of Birth

MM/DD/YYYY

Search

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.

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 text 'Appointment Management', and a '+ New Appointment' button. A navigation bar below the header 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 patient releases 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 'View Profile' icon in the 'Actions' column of the second row to a text box that says: 'Click on “View Profile” for the assessment you would like to view'.

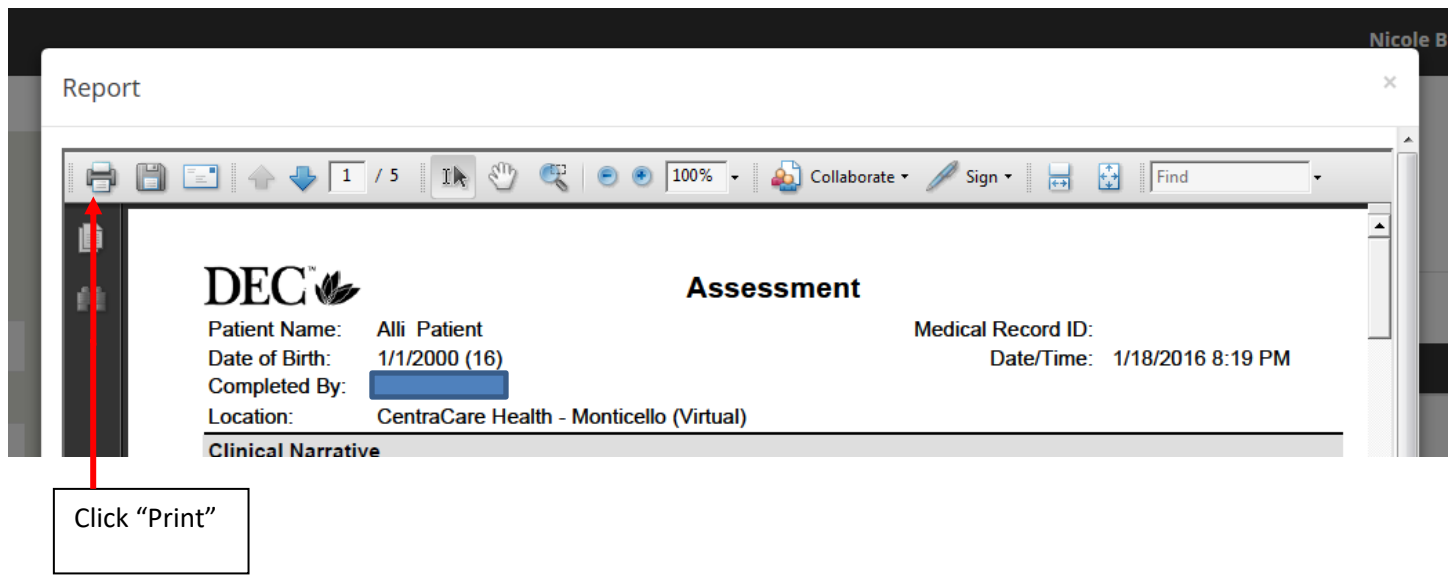
Below the table, there is a 'Patient History' section with tabs for 'Assessments' and 'Appointments'. Under 'Assessments', there is a table with columns: 'Date', 'Location', 'Assessor', 'Status', 'Final Disposition', and 'Actions'. The table has one row with the following data: '1/16/2016 8:35 pm', 'CentraCare Health - Monticello (Virtual)', a blue square icon for the assessor, 'Audit In Progress', and 'Inpatient'. A red arrow points from the 'View Report' icon in the 'Actions' column 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)		Audit In Progress	Inpatient	

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.