Client Care Search User Training

All training materials are posted on BHA's website.

COLORADO
Behavioral Health
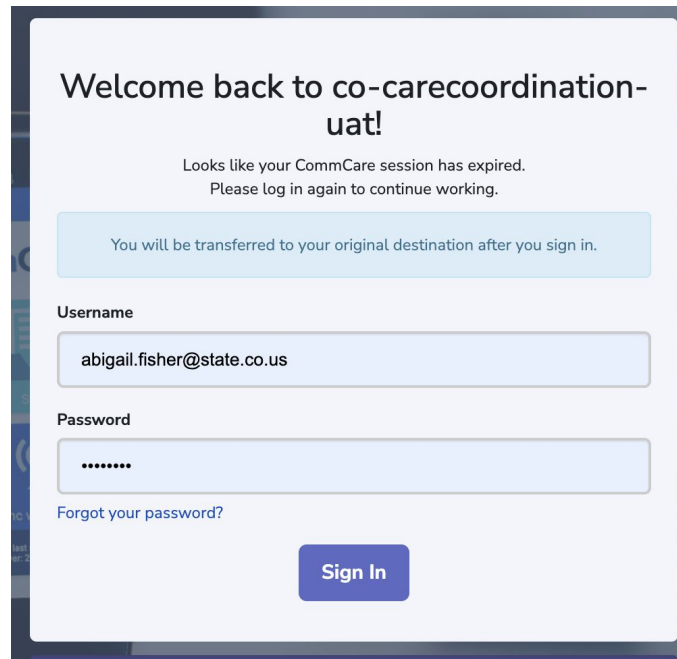Administration

What is the Client Care Search?	A system where inpatient and residential behavioral health providers track their bed availability, and where care navigators can find information for client placements.
Why does BHA have a Client Care Search?	The "Client Care Search" tool is outlined in Colorado Revised Statute 27-60-104.5, which states that Colorado's Behavioral Health Administration (BHA) must create "a behavioral health capacity tracking system of available treatment capacity and medication-assisted treatment programs [to] help families, law enforcement agencies, counties, court personnel, and emergency room personnel locate an appropriate treatment option for individuals experiencing behavioral health crises."
Who are users of the Client Care Search?	- Inpatient / residential behavioral health facilities - Outpatient / other types of behavioral health facilities and clinicians - State agency care coordination teams - Intermediary organizations including MSO/ASOs, RAEs, BHASOs - Community-based organizations that provide behavioral health services
How can users get Client Care Search tech support?	Email cdhs_bha_provider_support@state.co.us, monitored 8am-5pm, Monday-Friday, with the subject line "Client Care Search."
How is data from Client Care Search used?	- Data is used to validate that providers are remaining in compliance with updates. - Data in aggregate is sometimes used to do analysis on Colorado care navigation.
How do people get access to Client Care Search?	Access to Client Care Search is limited to organizations that hold BHA license/designations. Please email cdhs_bha_provider_support@state.co.us if you think you should have access to Client Care Search and have not been contacted by BHA.

Logging In

You should have received an email from the CommCare platform with an invitation to create an account.

📍 If you can't find your invitation, start by checking your spam folder! The email would be from sender cdhs_bha_provider_support@state.co.us .

Welcome back to co-carecoordination-uat!

Looks like your CommCare session has expired.
Please log in again to continue working.

You will be transferred to your original destination after you sign in.

Username

abigail.fisher@state.co.us

Password

••••••••

Forgot your password?

Sign In

Two-Factor Authentication (2FA)

2FA is a measure that strengthens security by requiring two methods to verify your identity (i.e. login credentials and a secondary code). OTP users are required to set up 2FA to ensure the security of this system.

You can choose to use the following options:
- Google Authenticator app for your smartphone
- Text Message
- Phone Call

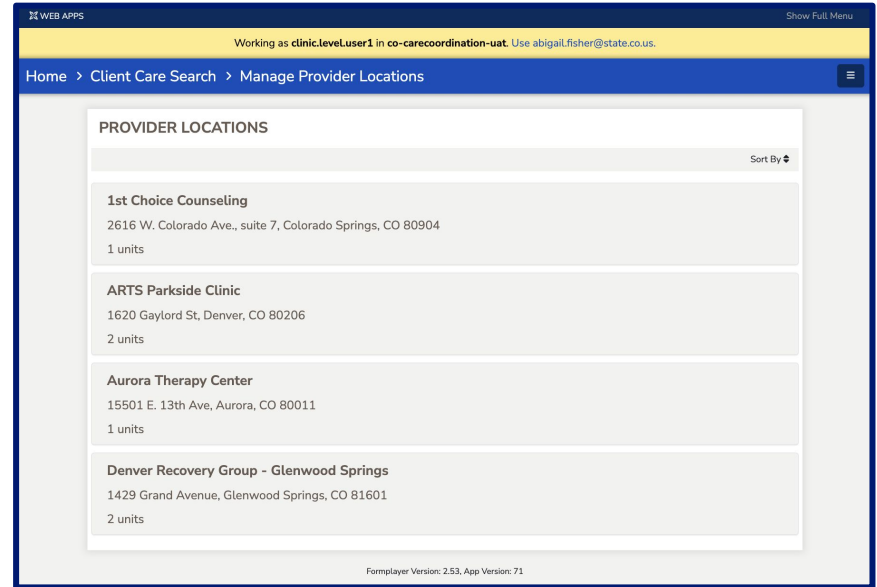📍 Each user at your organization should have their own unique login account, no account sharing please!
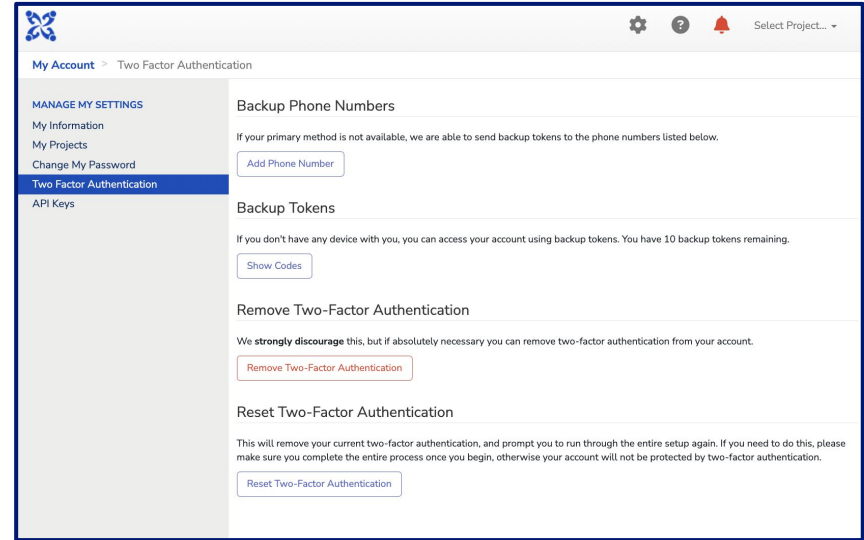
Manage Provider Locations

When you log into Client Care Search for the first time, you'll begin by reviewing your organization's information within the Manage Provider Locations module. You will need to create units and beds within this module to begin updating your bed availability.

Once you click on the module, you will be taken to a page that lists all the provider locations you have been assigned to.

Begin by clicking on one of the locations to review and add information to your location's profile. This is the profile that will be shown in the Bed Search directory in Client Care Search.

Editing Provider Location Profile

The *Location Information* section contains uneditable information on your provider location from BHA's Licensing and Designation Database and Electronic Records System (LADDERS).

Next you'll see the *Admissions Information* section where you can enter and edit information about your organization's intake process. Fill out this information, including any links to public waitlists and intake forms.

Once you're happy with your edits, hit save to see those changes reflected across Client Care Search after 24 hours.

Editing Units & Bed Types

To add a new unit, click on the Create New Unit button and begin by selecting how many units you want to create. Then fill out the rest of the information for your unit, considering what information would be most helpful to other providers seeking client placement.

Next, you'll need to create bed types for that unit. Begin by selecting how many bed types you want to create. Then fill out the rest of the information for the bed type, considering what information would be most helpful to other providers seeking client placement. Elements you could consider adding to your bed names and description include: age restrictions, type of care provided (ex. hospital bed), anything unique about care setting, etc.

Once you're happy with your edits, hit Create Unit(s) to see those changes reflected across Client Care Search.
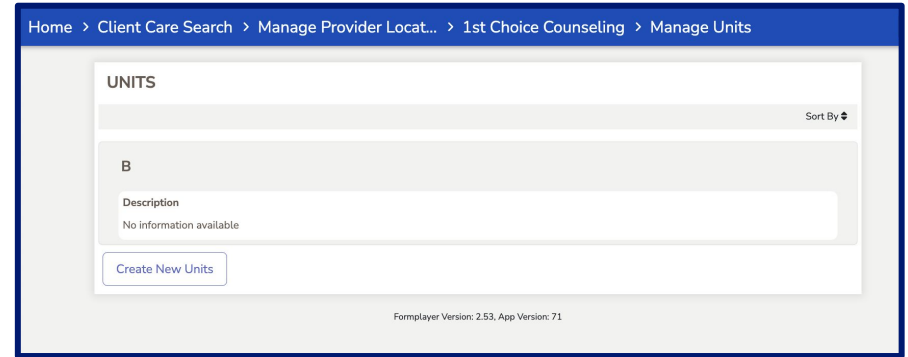
Update Bed Availability

Once you have created your units and bed types, you're ready to start updating your bed availability! You'll begin by selecting the Update Bed Availability module.

You'll be taken to a page with all of the units for provider locations you are assigned to. You have the ability to select "No change all units" or you can update each unit individually. Once you fill out that day's information you can hit save to have those updates reflected across Client Care Search.

Search Beds

If you want to look for beds or to check how your organization's information is displayed, begin by selecting that module.

From there you will be taken to a directory that provides filters for client information as well as facility information, a list of relevant providers, and a map feature. Toggle the filters to determine the types of facilities that might be most relevant for your client's needs, and then hit search.

If no results are returned for your search, try toggling filters to be more broad. We encourage you to still contact facilities even if they don't have beds available because bed availability can change more frequently than updates are made in the system.

Onboarding → Manage Provider Locations → Update Bed Availability → **Search Beds** → Other Features

User Admin Features

Organizations can designate user admins within the Client Care Search system which will grant those users the ability to manage, add, and remove users from the system.

1. Log in to CommCare with your admin credentials and navigate to the "Users" tab in the main navigation menu by clicking "Show Full Menu" in the upper right hand corner of the screen.

2. Select "Web Users" from the dropdown options.

3. Click the "Invite Web User" button.

4. Fill in the required details:

   a. *Email address:* Enter the user's email address.

   b. *Role:* E.g. "Client Care Search Facility User."

   c. *Profile:* E.g. "Client Care Search Facility User."

   d. *Location:* Specify the user's locations. If the user is associated with multiple or all locations within a network, make sure to select each relevant option from the dropdown menu.
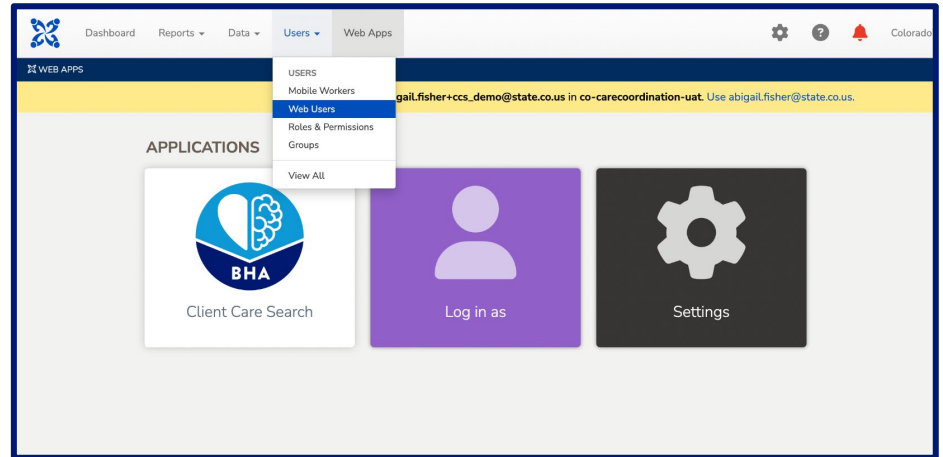
User Admin Features

There are a number of other tasks that user admins are able to perform.

View User List: Navigate to the "Users" tab in the main navigation menu. Under "Current Users," you will see a list of all active users. You can click page by page or search for specific users by their email address.

Edit User Details: Click on the name of the user you want to edit under "Current Users". Modify the necessary details, such as their role, email address, or other relevant information. Click "Update Information" to apply the changes within each section.

Manage Pending Invitations: Navigate to the "Pending Invitations" section. Select the invitation you want to manage, and choose either "Delete" or "Resend Invitation." Note: Invitations expire after 30 days.

Remove Users: In the "Current Users" list, locate the user whose access you need to revoke. Click "Remove Membership" to revoke the user's access to the application.

Onboarding → Manage Provider Locations → Update Bed Availability → Search Beds → **Other Features**