

# Client Care Search User Training

*All training materials are posted on [BHA's website](#).*



**COLORADO**  
Behavioral Health  
Administration

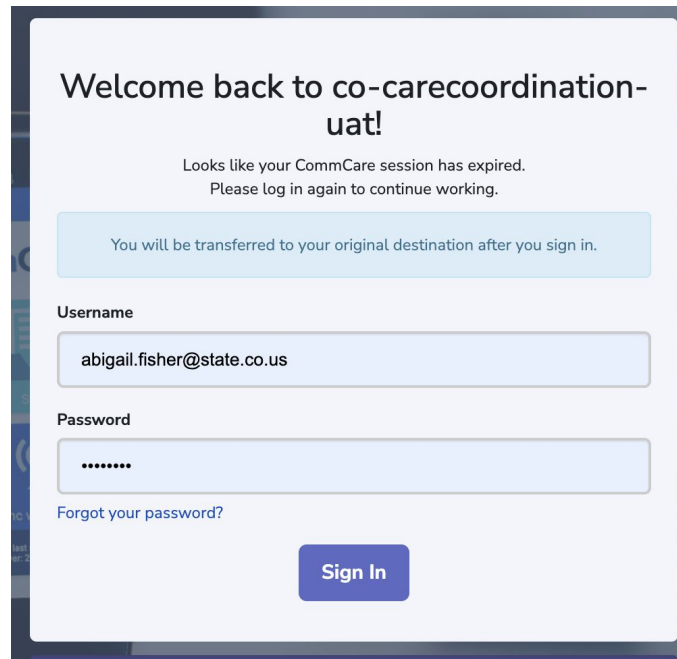
<b>What is the Client Care Search?</b>	A system where inpatient and residential behavioral health providers track their bed availability, and where care navigators can find information for client placements.
<b>Why does BHA have a Client Care Search?</b>	The “Client Care Search” tool is outlined in Colorado 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.”
<b>Who are users of the Client Care Search?</b>	<ul style="list-style-type: none"> <li>• Inpatient / residential behavioral health facilities</li> <li>• Outpatient / other types of behavioral health facilities and clinicians</li> <li>• State agency care coordination teams</li> <li>• Intermediary organizations including MSO/ASOs, RAEs, BHASOs</li> <li>• Community-based organizations that provide behavioral health services</li> </ul>
<b>How can users get Client Care Search tech support?</b>	Email <a href="mailto:cdhs_bha_provider_support@state.co.us">cdhs_bha_provider_support@state.co.us</a> , monitored 8am-5pm, Monday-Friday, with the subject line “Client Care Search.”
<b>How is data from Client Care Search used?</b>	<ul style="list-style-type: none"> <li>• Data is used to validate that providers are remaining in compliance with updates.</li> <li>• Data in aggregate is sometimes used to do analysis on Colorado care navigation.</li> </ul>
<b>How do people get access to Client Care Search?</b>	Access to Client Care Search is limited to organizations that hold BHA license/designations. Please email <a href="mailto:cdhs_bha_provider_support@state.co.us">cdhs_bha_provider_support@state.co.us</a> 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

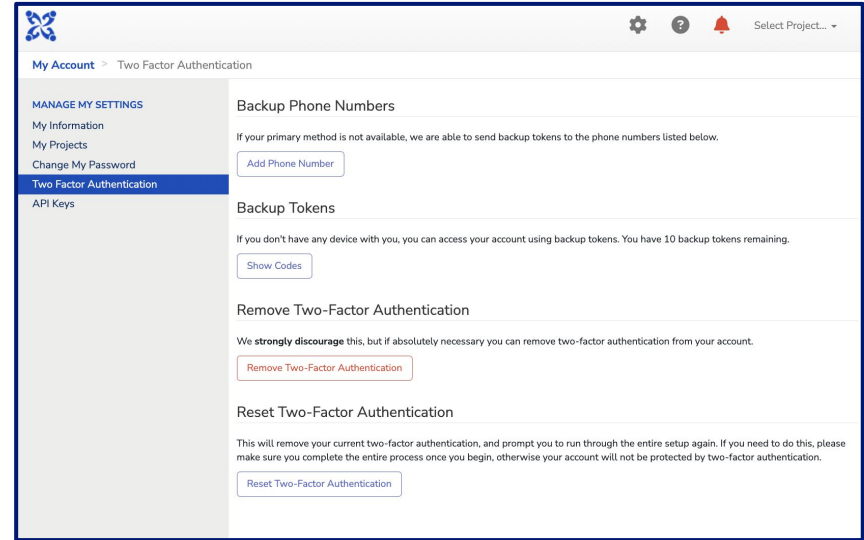
# Two-Factor Authentication (2FA)

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!

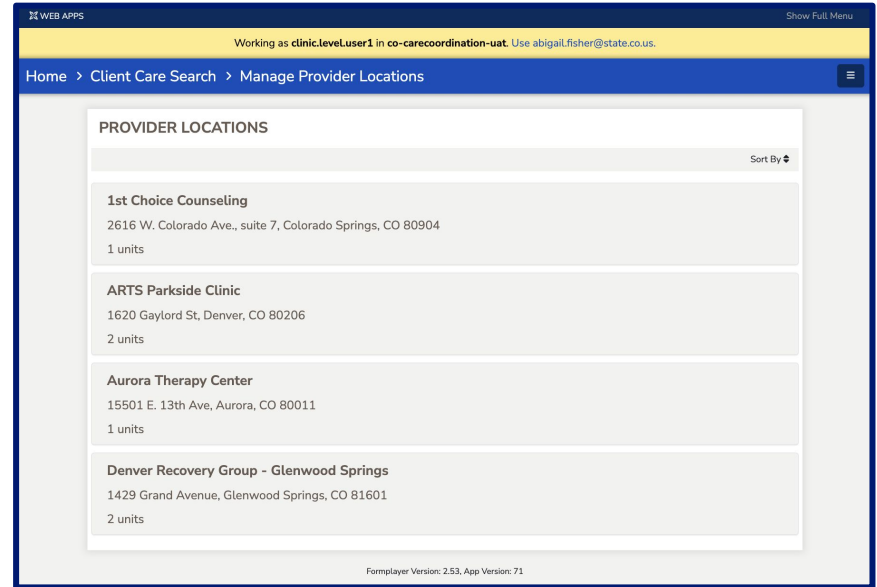


# Manage Provider Locations

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.



The screenshot shows a web application interface for managing provider locations. At the top, there is a navigation bar with the text "WEB APPS" and "Show Full Menu". Below this, a yellow status bar indicates the user is logged in as "clinic.LevelUser1 in co-carecoordination-uat" with the email "Use abigail.fisher@state.co.us". The main navigation bar shows the path "Home > Client Care Search > Manage Provider Locations". The main content area is titled "PROVIDER LOCATIONS" and includes a "Sort By" dropdown menu. The list of provider locations is as follows:

Provider Name	Address	Units
1st Choice Counseling	2616 W. Colorado Ave., suite 7, Colorado Springs, CO 80904	1 units
ARTS Parkside Clinic	1620 Gaylord St, Denver, CO 80206	2 units
Aurora Therapy Center	15501 E. 13th Ave, Aurora, CO 80011	1 units
Denver Recovery Group - Glenwood Springs	1429 Grand Avenue, Glenwood Springs, CO 81601	2 units

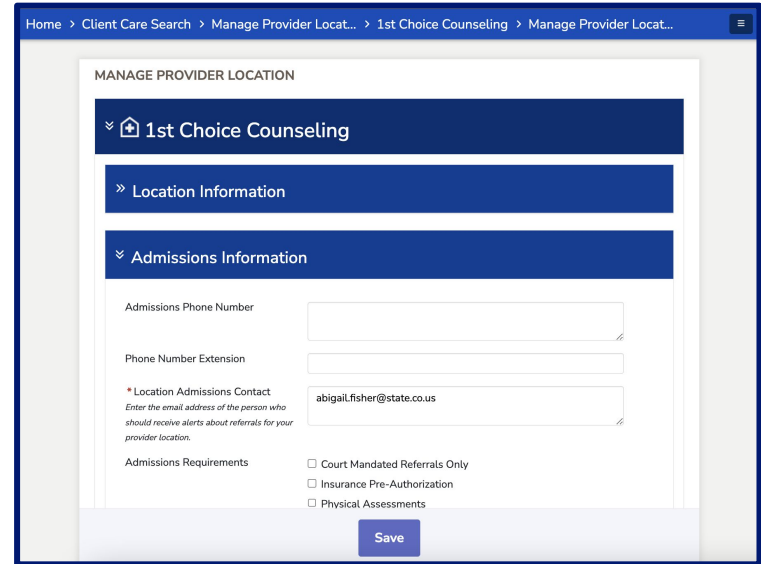
At the bottom of the page, the version information "Formplayer Version: 2.53, App Version: 71" is displayed.

# 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.



The screenshot shows a web browser window with the following breadcrumb trail: Home > Client Care Search > Manage Provider Locat... > 1st Choice Counseling > Manage Provider Locat... The main content area is titled 'MANAGE PROVIDER LOCATION' and features a dark blue navigation bar with a home icon and the text '1st Choice Counseling'. Below this, there are two expandable sections: 'Location Information' (indicated by a right-pointing arrow) and 'Admissions Information' (indicated by a downward-pointing arrow). The 'Admissions Information' section contains the following fields and options:

- Admissions Phone Number:** An empty text input field.
- Phone Number Extension:** An empty text input field.
- \* Location Admissions Contact:** A text input field containing the email address 'abigail.fisher@state.co.us'. A small note below the field reads: 'Enter the email address of the person who should receive alerts about referrals for your provider location.'
- Admissions Requirements:** A list of three checkboxes:
  - Court Mandated Referrals Only
  - Insurance Pre-Authorization
  - Physical Assessments

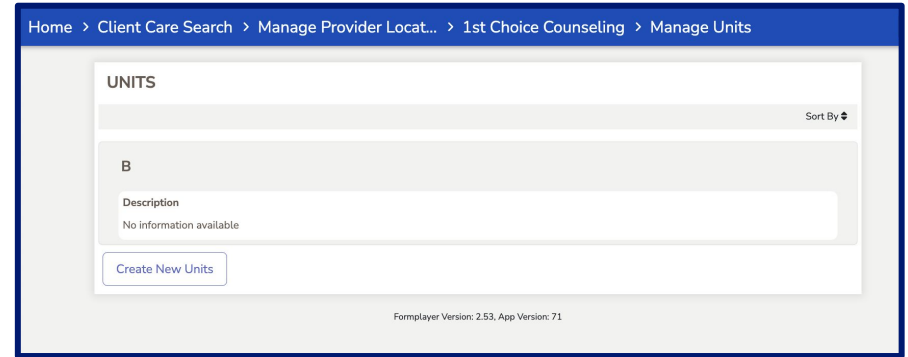
A blue 'Save' button is located at the bottom right of the form area.

# 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.

Home > Client Care Search > Update Bed Availability > (4) 1st Choice Counseling, ...

UPDATE BED AVAILABILITY

[Go to mobile view](#)

1st Choice Counseling

No change all units No Last Updated Information Available  
Out of compliance - please update bed availability

B (1st Choice Counseling)

No beds available for B Total Available Beds: 85

Residential	Bed Gender: Female/Woman	Bed Acuity: High	* Availability
			85

Save



# 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.

Home > Client Care Search > Search Beds

SEARCH BEDS

Client Information

Age: Please select one

Gender Identity: Please select one or more

Location: Search

Distance (miles):

Client is involuntary:  Client is involuntary

Client is justice-involved:  Client is justice-involved

SEARCH BEDS

Sort By

1st Choice Counseling

Address: 2616 W. Colorado Ave., suite 7, Colorado Springs, CO 80904

Care Type: Substance Use

Admission Contact: No information available

Insurance: Self-Pay

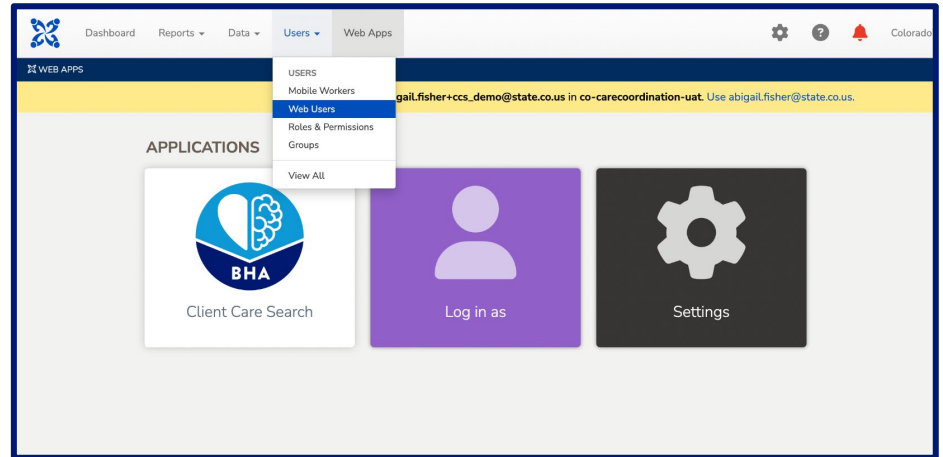
Unit Name	Beds Available (updated 14 hours ago)	Bed Acuity	Bed Gender
B	85	High	Female/Woman

1st Priority Institute for Better Living

# 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.

