Client Care Search
User Guide

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Client Care Search Basics

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." Have feedback on the tool? Let us know! We monitor this form for potential product improvements based on BHA resourcing.
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.

Onboarding

Logging In

Initially, you will receive an email invitation to the system. This email comes from cdhs_bha_provider_support@state.co.us. If you cannot find this email in your mail Inbox, please look in your spam folder. If it is not either in your Inbox or spam folder, please contact cdhs_bha_provider_support@state.co.us for further assistance. We recommend that you bookmark the [login page](#) for easy access going forward.

If the invitation has expired (more than 30 days passed since the email was sent to you) please contact cdhs_bha_provider_support@state.co.us for further assistance.

Two-Factor Authentication (2FA)

After you finish your initial login, you will see a window prompting you to setup two-factor authentication. 2FA is a measure that strengthens security by requiring two methods to verify your identity (i.e. login credentials and a secondary code). Users are required to set up 2FA to ensure the security of this system.

📍 **Remember to use a "+1" for the US country code!**

Detailed Steps

Scenario: Resetting your current two-factor authentication under your account settings

1. Go to the settings widget at the upper right hand corner, that looks like a gear icon

2. Select "My Account Settings"

3. Click on Two Factor Authentication

4. Select "Reset Two Factor Authentication." This will make you go through the process of updating your two-factor process. Before doing this, please make sure you have tokens available to confirm your original two-factor, as the system will make you go through the process again.

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

During two-factor authentication setup, each user will receive 10 backup tokens. These are one-time codes that allow you to login to your account if you lose access to your two-factor authentication. These backup tokens should be copied/printed and saved in a secure place. It's always good to keep these on hand for situations where you think you might not be able to access your normal 2FA method.

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.

There are two locations for editing your provider location profile:

- Manage Provider Location
- Manage Units

Editing Provider Location Profile

On the Manage Provider Location page, you will see several sections.

The *Location Information* section contains uneditable information on your provider location from BHA's Licensing and Designation Database and Electronic Records System (LADDERS). If you need to edit this information you will need to log into LADDERS and make those edits there, and those edits will populate in Client Care Search after 24 hours. Typically your licensing liaison will have that login and can assist you with any necessary edits.

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. This information will help other providers better understand your organization's admission process and hopefully decrease the amount of ineligible referrals your organization gets.

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

Detailed Steps

Scenario: Updating your provider location's information

5. Select Manage Provider Location module.

6. Select the provider location you want to edit.

7. Select the *Manage Provider Location* button.

8. Update the relevant *Admissions Information* (go to [LADDERS](#) to edit the information within the *Location Information* section).

9. Hit *Save* to see those changes reflected across Client Care Search.

Editing Units & Bed Types

On the Manage Units page, you have the ability to edit existing units and to add new units to your provider location.

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.

Detailed Steps

Scenario: Creating unit and bed types

1. Select Manage Provider Location module.

2. Select the provider location that has the unit you wish to edit.

3. To create a new unit, select the *Create New Units* button.

4. To edit an existing unit, select that unit.

5. Enter the information on those units and bed types.

6. Hit *Save* 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.

Detailed Steps

Scenario: Updating bed availability

1. Select Update Bed Availability module.

2. Select "No change all units" for each of your assigned locations and/or update the availability for each bed type.

3. Hit *Save* to see those changes reflected across Client Care Search.

Search Beds

The information your organization and the other providers in Client Care Search entered is displayed in Search Beds to assist with client care navigation. 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.

📍 **Note the map only shows the providers currently shown in the adjacent list. Toggle the number of providers shown per page to show more locations on the map.**

Toggle the filters to determine the types of facilities that might be most relevant for your client's needs, and then hit search.

📍 **You must hit the purple search button in order for your filters to be applied to the list of providers.**

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.

Detailed Steps

Scenario: **Search beds for a client**

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1. Select Search Beds module.

2. Enter search criteria in the left hand bar. Hit the *Search* button.

3. Review list and reach out to appropriate locations or search with different criteria.

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.

Detailed Steps

Scenario: **Add a user to Client Care Search**

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 locations, make sure to select each relevant option from the dropdown menu. The general account does not need to be added when user provisioning.

5. Click "Send Invite" which will send an email inviting the user to set up their account.

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.

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.

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.

Email Notifications

Users will be notified daily with a reminder to fill out bed availability. You can update this setting in the platform in the Email Settings module.

Troubleshooting

If you are encountering an error message or seeing a discrepancy in the data and have already tried to resolve your issue by syncing the application, you can try clearing user data or breaking lock requests as a second line of troubleshooting. In the Web Apps home screen, select the Settings button.

Next, click "Break" to break pending request locks or "Clear" to clear user data. This ensures that your user is aligned with the current system and that any processes that were causing an issue are cleared.

SETTINGS	
Break Pending Request Locks	Break
Clear user data	Clear
Done	

Common Issues	Answers/Suggestions
Which browser should I use to access the system?	We recommend using Firefox or Google Chrome to use the application. Specifically, we have found that Internet Explorer does not show parts of the application, including the CommCare Help Menu. For System Administrators who require reporting capabilities, Google Chrome is the recommended browser. For ease of access, users should bookmark the application on their chosen web browser.
Is the CommCare website down?	You can see the status of CommCare's website on this website. If you do not see a status update and are unable to access the system

	you can submit a support ticket to cdhs_bha_provider_support@state.co.us.
Can I use the system on my phone or tablet?	This is not recommended. The CommCare can be accessed through on Android phones and tablets using the CommCare mobile application however this application and its features have been designed to work on web applications, Dimagi recommends that you use the system on a desktop or laptop computer.
I am getting a cookie error when I log into the system.	If you are receiving a cookie error, please try clearing your browser's cache or hitting "refresh." If this does not work, please try using a different browser.
I keep getting logged out of the system.	For security reasons, the system has an inactivity timeout in place. After 30 minutes of inactivity, your login session will time-out. Should this happen, you will be prompted to be logged back in through a new window.
I selected an answer for a question that I want to leave blank. Is there a way to "unselect" my answer?	If you selected a "multi-selection" option (square button), hold down on the button that you selected. This will un-select the option. If you have selected a "single-select" option (circular button), you can select the Clear button or select another option.
I'm getting the error message "There are errors in this form's answers. These must be corrected before the form can be submitted." What does this mean and what should I do?	Either you did not respond to a required question or one of your answers is not in the required format. Please scroll back up through the form and look for a small red check on the right hand side. When you find the problem, there will be red text describing what needs to be changed.