User Guide-Provider CareLink
Version 1.4
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1. Purpose and Introduction

This document describes the basics of navigating in the BHSDSTAR CareLink application.

1.1 General Information

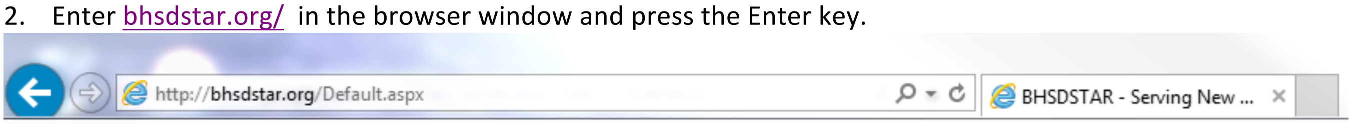
1. You must have your own unique email address to have an account.
2. All activity done using an account is tracked and recorded in BHSDSTAR. Do not share your account information.
3. It is important to know your organizations primary and/or secondary account manager for BHSDSTAR. They will be able to answer most questions for you about how they want you to use the application.
4. Online videos, super-quick guides and comprehensive user guides are available on bhsdstar.org. For question that can't be answered by the online resources or your primary/secondary contact, or any issues you may encounter in BHSDSTAR, please email support@bhsdstar.org to create a support ticket.
5. Any identifying client information sent through email is a HIPAA violation. Use only the BHSDSTAR Client ID when needing to reference a specific client.
6. The Tracking module for any given program provides quick links and information about important items specific to the program. This is located on the landing page for the program.

2. Log In and Account Settings

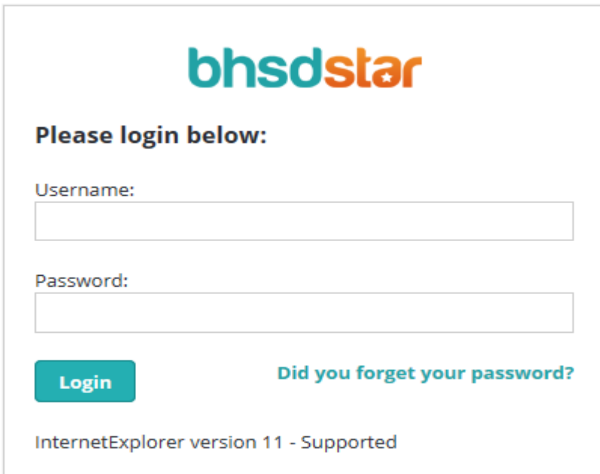
2.1 To Log in:

1. From the desktop double-click your internet browser to launch. (For best results we recommend Goggle Chrome but other browsers can also be used.)

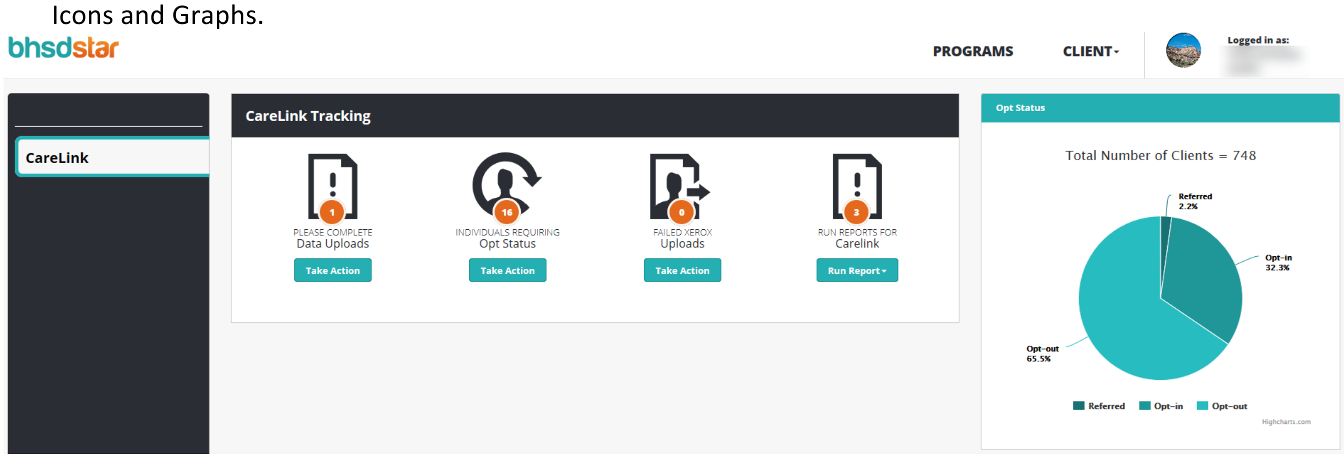
2. Enter bhsdstar.org/ in the browser window and press the Enter key.



3. Click the Provider Login button.
4. Click in the Username field and enter user name.
5. Press the Tab key or click in the Password field and enter user password.
6. Click the Login button.



7. The Home screen will display listing Programs on the Left Navigation when selected their Tracking Icons and Graphs.



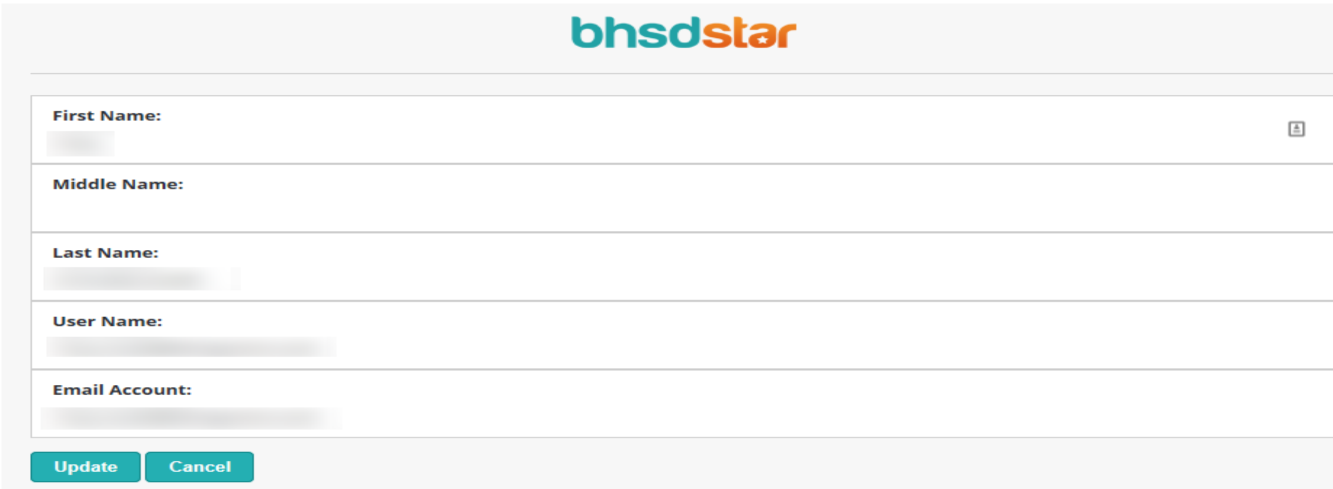
Tip: This screen can be viewed at any time by clicking Programs in the upper right corner of the screen or by clicking the program on the left navigation.

Tip: Items requiring action are displayed with an 

Icon listing the # of items for each Tracking Item and the Take Action button is displayed.

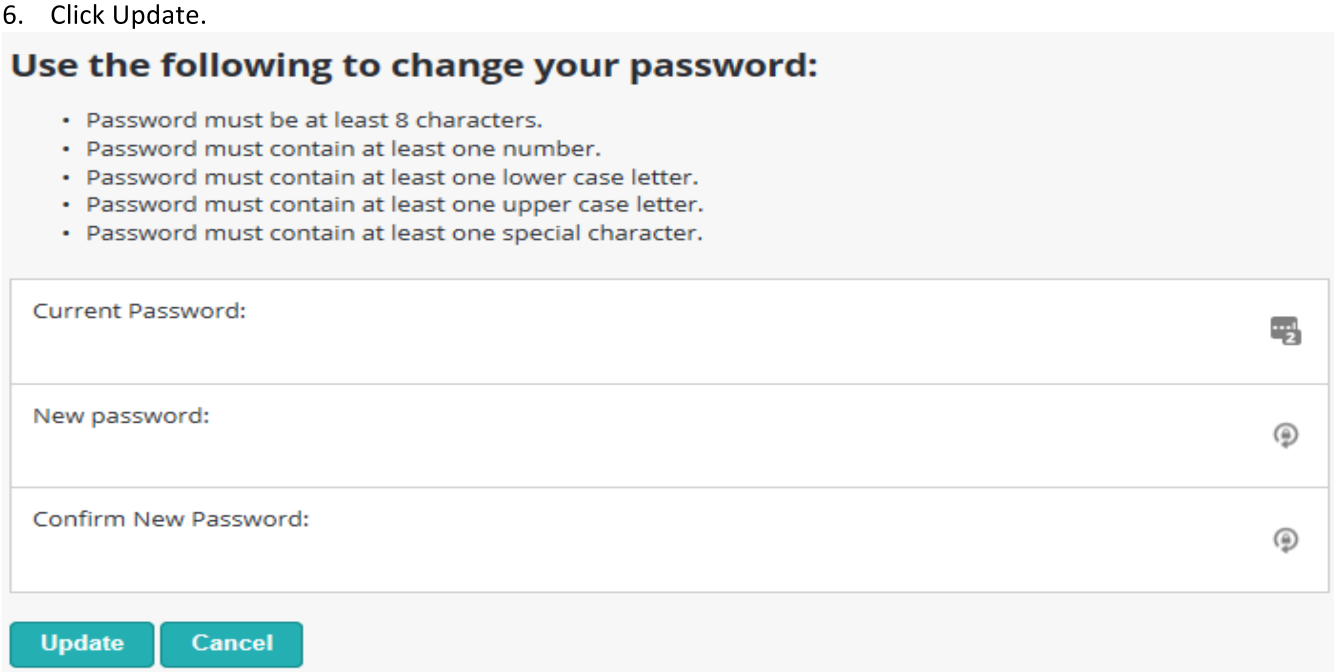
2.2 To edit Profile Settings:

1. Click on your logged in Name in the upper right corner.
2. Click Update Profile.
3. Click the field you want to edit and enter new information.
4. Click Save.



2.3 To edit Password:

1. Click on your logged in Name in the upper right corner.
2. Click Change Password.
3. Enter current password.
4. Enter a new password.
5. Re-enter the new password.
6. Click Update.

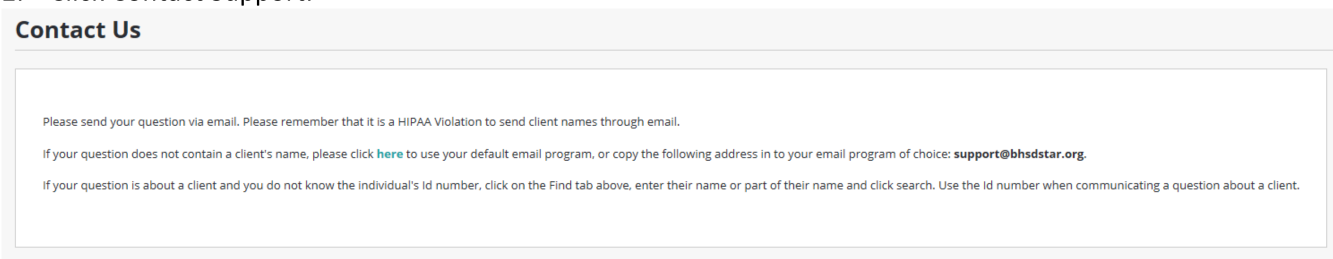


Tip: Password must be changed every 90 days, contain at least eight characters, contain at least one number, contain at least one lower case letter, contain at least one upper case letter, and contain at least one special character.

2.4 To contact Support via Email:

Tip: Never send a client's name in the free text section of the email-refer to them by the last 5 digits of their BHSDSTAR Client ID.

1. Click on your logged in Name in the upper right corner.
2. Click Contact Support.



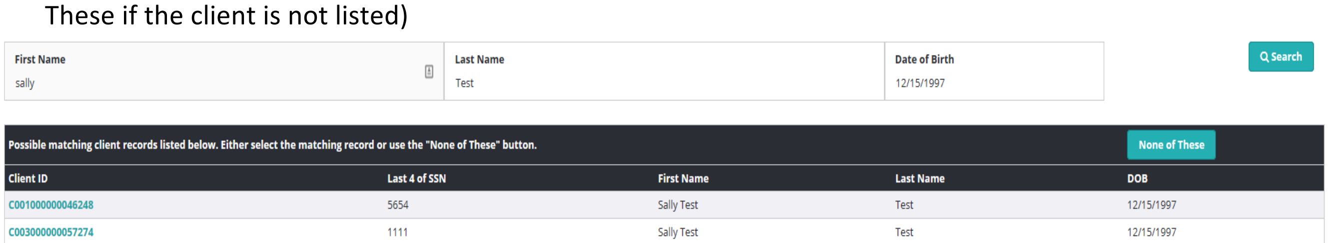
2.5 To Logout:

1. Click on your logged in Name in the upper right corner.
2. Click Logout.

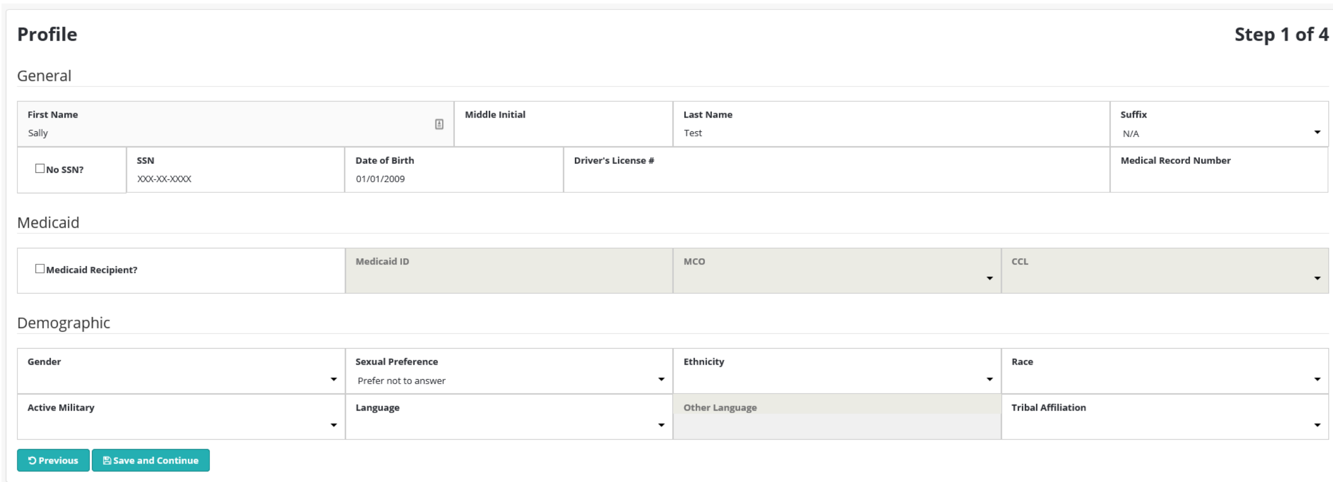
3. Client Registration

From the Home screen:

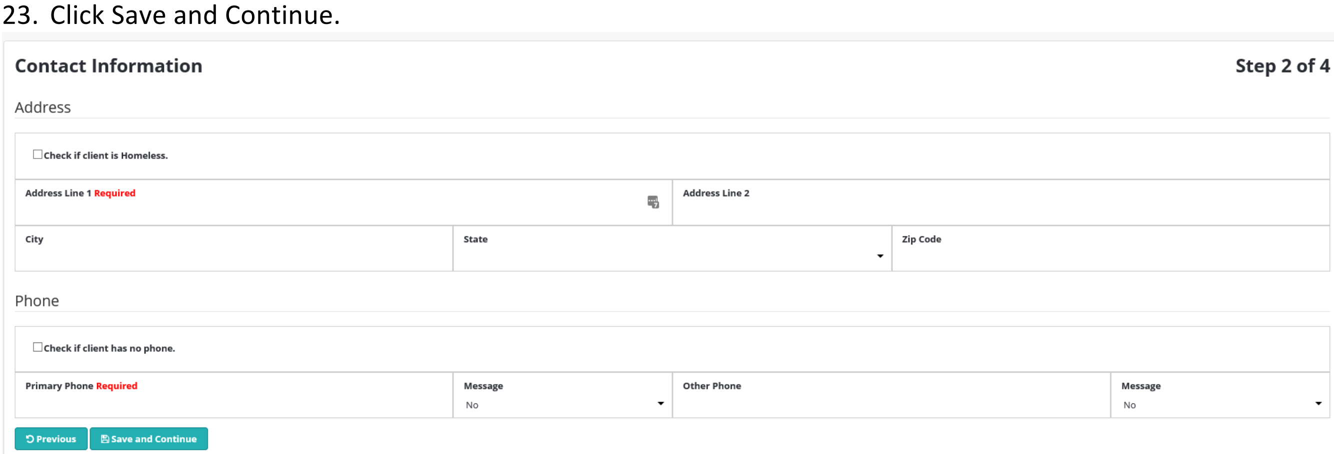
1. Click Client, Register.
2. Click the First Name field and enter name.
3. Click the Last Name field and enter name.
4. Click the Date of Birth Field and enter DOB.
5. Click Search.
6. The system displays possible matches or the registration screen if no matches are found. (Click None if These if the client is not listed)



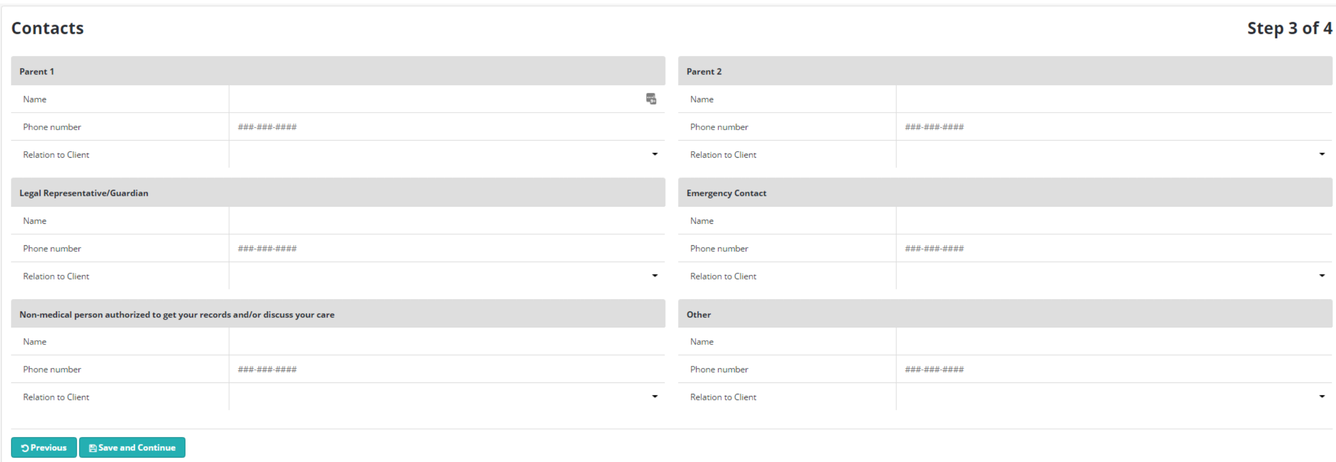
Tip: Registration is used to identify existing records in BHSDSTAR first to avoid duplication of individuals in the system. One individual can be participating in other programs with other providers or have done so in the past.



7. Click the Middle Initial field and enter middle initial.
8. Click the Suffix drop-down and click suffix.
9. Click the SSN field and enter SSN or click the No SSN checkbox to select.
10. Click the Medical Record Number field and enter MRN.
11. Click the Medicaid Recipient checkbox to select.
12. Click the Medicaid ID field and enter ID.
13. Click the MCO drop-down and click MCO.
14. Click the CCL drop-down and click CCL.
15. Click the Gender field and click gender.
16. Click the Sexual Preference drop-down and click preference.
17. Click the Ethnicity drop-down and click Ethnicity.
18. Click the Race drop-down and click Race.
19. Click the Active Military drop-down and click status.
20. Click the Language drop-down and click language.
21. Click the Other Language field and enter other language.
22. Click the Tribal Affiliation drop-down and click affiliation.
23. Click Save and Continue.

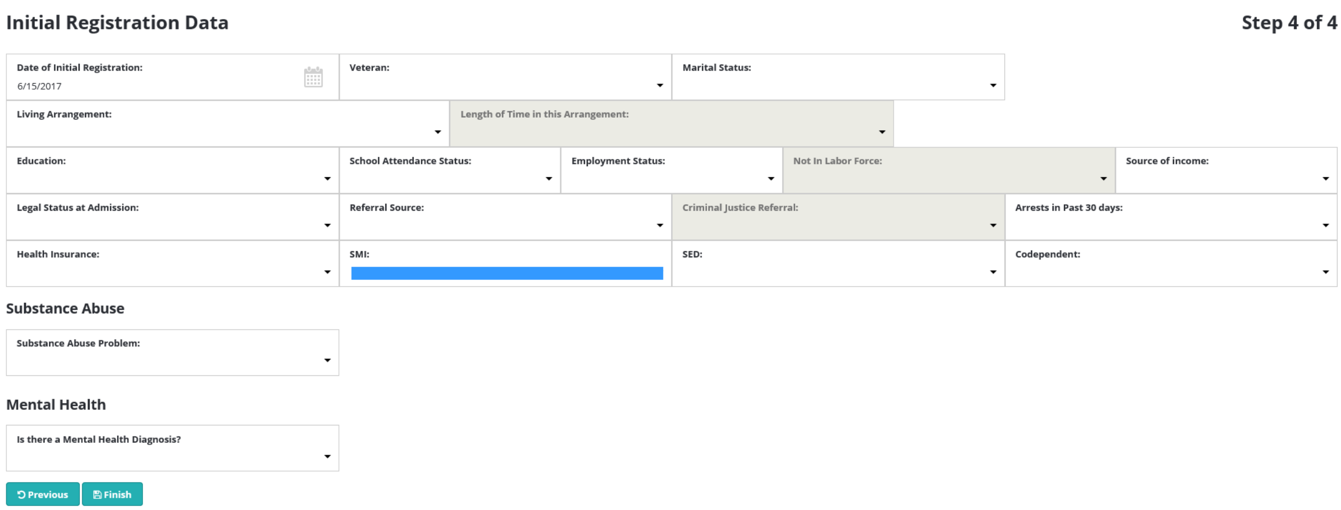


24. Click the Address 1 field and enter address or click the Homeless checkbox to select.
25. Click the Address 2 field and enter address.
26. Click the City field and enter city.
27. Click the State drop-down and click state.
28. Click the Zip Code field and enter zip code.
29. Click the Phone field and enter number or click the No Phone checkbox to select.
30. Click the Message drop-down and click Yes or No.
31. Click the Other Phone field and enter number.
32. Click the Message drop-down and click Yes or No.
33. Click Save and Continue.

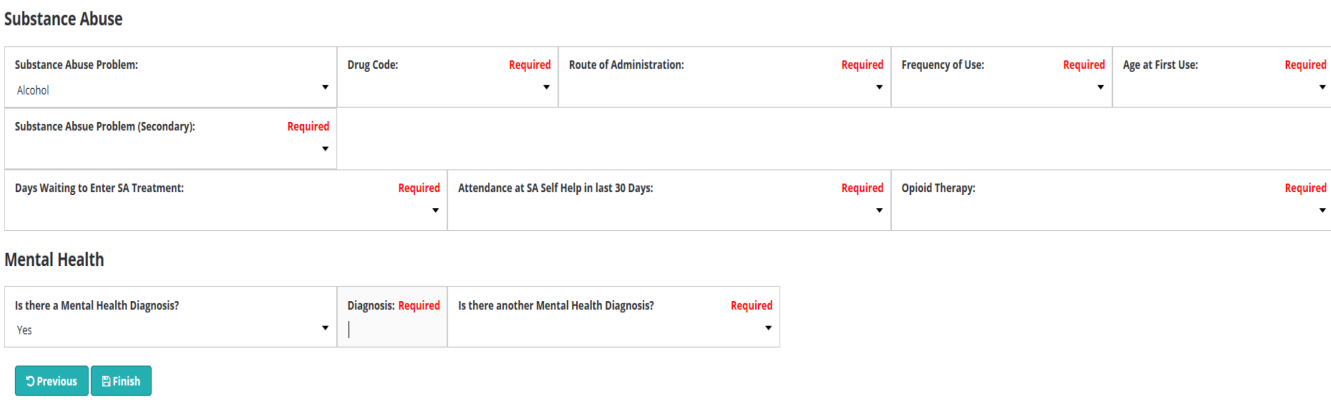


34. Click the Name field under Parent 1 and enter a name
35. Click the Phone Number field under Parent 1 and enter a phone number
36. Click the Relation to Client drop-down under Parent 1 and select a relationship status
37. Click the text box under Parent 1 and describe the relationship if ‘Other’ is selected in step #36
38. Click the Name field under Parent 2 and enter a name
39. Click the Phone Number field under Parent 2 and enter a phone number
40. Click the Relation to Client drop-down under Parent 2 and select a relationship status
41. Click the text box under Parent 2 and describe the relationship if ‘Other’ is selected in step #36
42. Click the Name field under Legal Representative/Guardian and enter a name
43. Click the Phone Number field under Legal Representative/Guardian and enter a phone number
44. Click the Relation to Client drop-down under Legal Representative/Guardian and select a relationship status
45. Click the text box under Legal Representative/Guardian and describe the relationship if ‘Other’ is selected in step #36
46. Click the Name field under Emergency Contact and enter a name
47. Click the Phone Number field under Emergency Contact and enter a phone number
48. Click the Relation to Client drop-down under Emergency Contact and select a relationship status
49. Click the text box under Emergency Contact and describe the relationship if ‘Other’ is selected in step #36
50. Click the Name field under Non-medical person and enter a name
51. Click the Phone Number field under Non-medical person and enter a phone number
52. Click the Relation to Client drop-down under Non-medical person and select a relationship status

53. Click the text box under Non-medical person and describe the relationship if 'Other' is selected in step #36
54. Click the Name field under Other and enter a name
55. Click the Phone Number field under Other and enter a phone number
56. Click the Relation to Client drop-down under Other and select a relationship status
57. Click the text box under Other and describe the relationship if 'Other' is selected in step #36
58. Click Save and Continue.



59. Click Date of Initial Registration calendar and click date.
60. Click Veteran drop-down and click status.
61. Click Marital Status drop-down and click status.
62. Click Pregnant drop-down and click status. (Appears for Female clients)
63. Click Living Arrangement drop-down and click arrangement.
64. Click Education drop-down and click status.
65. Click School Attendance Status drop-down and click status.
66. Click Employment Status drop-down and click status.
67. Click Source of income drop-down and click source.
68. Click Legal Status at Admission drop-down and click status.
69. Click Referral Source drop-down and click source.
70. Click Arrest in Past 30 days drop-down and click # of arrests.
71. Click Health Insurance drop-down and click insurance carrier.
72. Click SMI drop-down and click status.
73. Click SED drop-down and click status.
74. Click Codependent drop-down and click status.
75. Click Substance Abuse Problem and/or Mental Health Diagnosis drop-down and click status.
76. Additional fields will display for entry as needed.
77. Complete the entry/selection for the displayed required fields.



78. Click Finish.
79. The Client Dashboard/Projects Tab is displayed.

4. Client Find

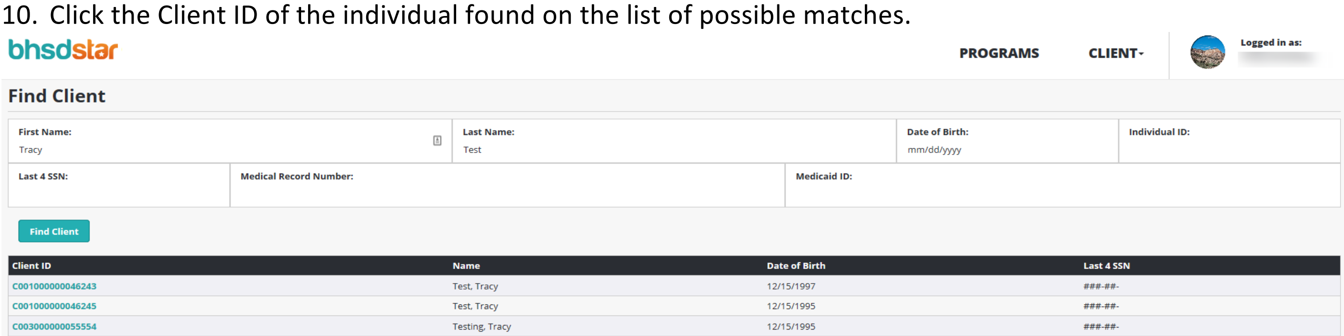
Tip: Find is used to find clients registered at your provider only.

From the Home screen:

1. Click Client, Find Client.
2. Click the First Name field and enter name.
3. Click the Last Name field and enter name.
4. Click the Date of Birth Field and enter DOB.
5. Click the Individual ID field and enter ID.
6. Click the Last 4 SSN field and enter the last 4 digits of the SSN.
7. Click Medical Record Number and enter number.
8. Click the Medicaid ID field and enter number.

Tip: Not all fields are required to Find a Client. You can Find by First Name only as an example.

9. Click Find Client.
10. Click the Client ID of the individual found on the list of possible matches.

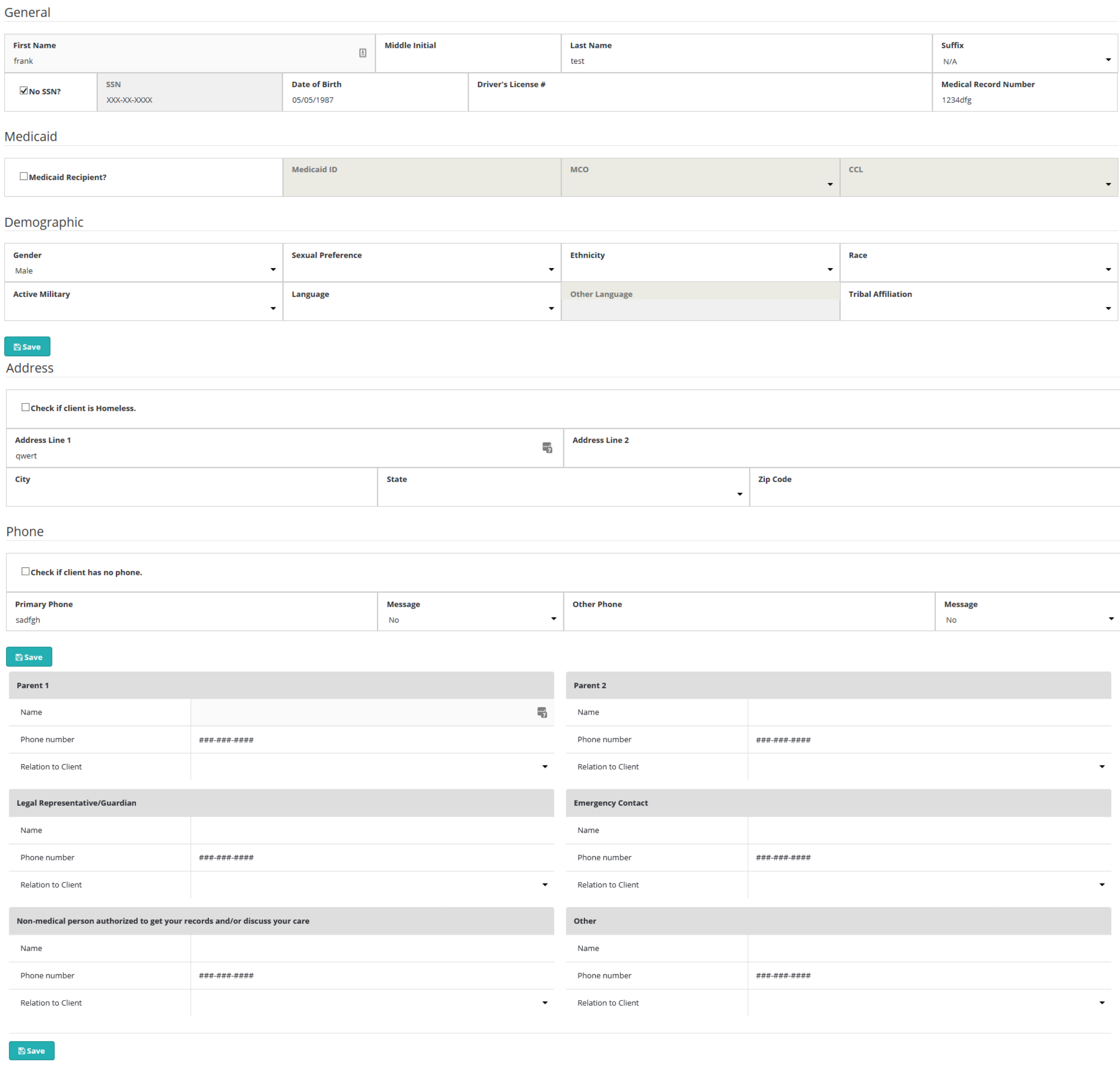


11. The Client Dashboard is displayed.

5. Client Contact Information

From the Client Dashboard:

1. Click Profile, Address & Phone, or Contact tab.
2. Click any of the fields and enter/edit the information.
3. Click Save.
4. The Client Dashboard is displayed.

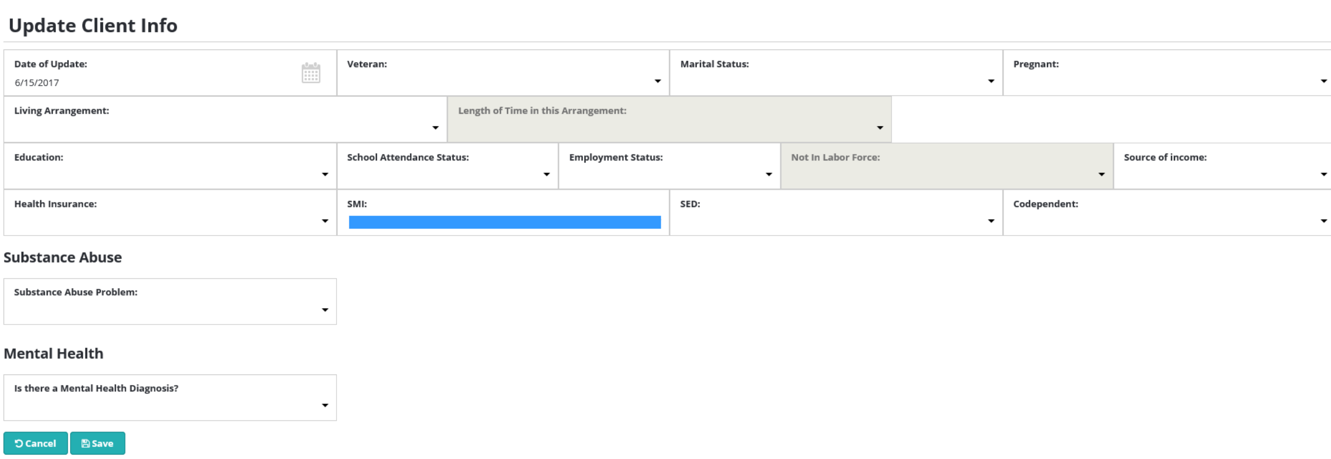


6. Client Mandated Data

6.1 Add Update:

From the Client Dashboard:

1. Click Mandated Data tab.
2. Click Add Assessment drop-down and click Update.
3. Click Date of Update calendar and click date.
4. Click Veteran drop-down and click status.
5. Click Marital Status drop-down and click status.
6. Click Pregnant drop-down and click status.
7. Click Living Arrangement drop-down and click arrangement.
8. Click Education drop-down and click status.
9. Click School Attendance Status drop-down and click status.
10. Click Employment Status drop-down and click status.
11. Click Source of income drop-down and click source.
12. Click Health Insurance drop-down and click insurance carrier.
13. Click SMI drop-down and click status.
14. Click SED drop-down and click status.
15. Click Codependent drop-down and click status.
16. Click Substance Abuse Problem and/or Mental Health Diagnosis drop-down and click status.
17. Additional fields will display for entry as needed.
18. Complete the entry/selection for the displayed required fields.

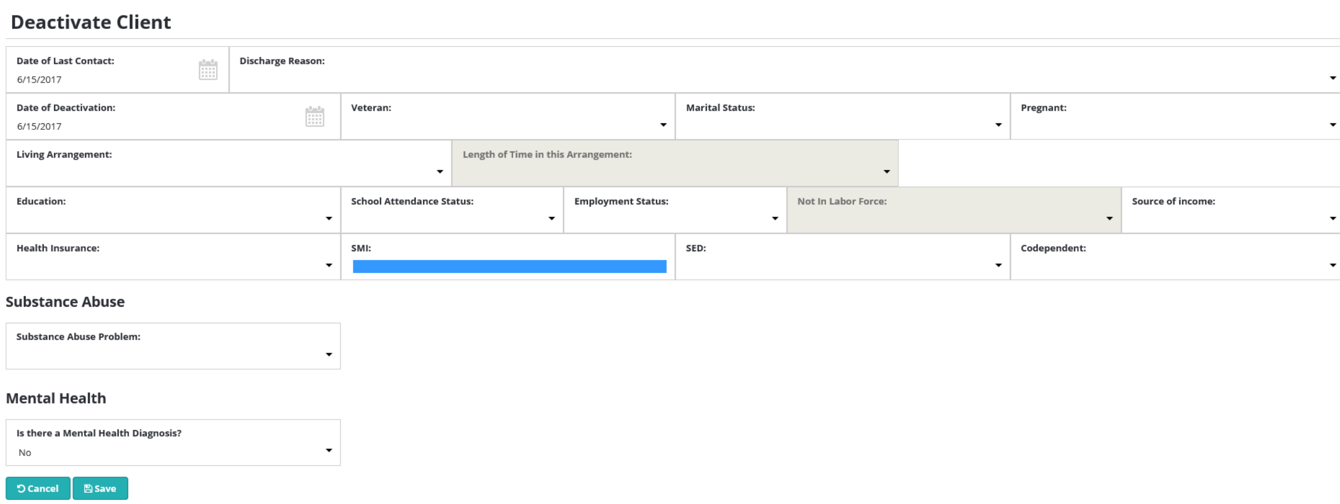


6.2 Add Discharge

From the Client Dashboard:

1. Click Mandated Data tab.
2. Click Add Assessment drop-down and click Discharge.
3. Click Date of Last Contact calendar and click date.
4. Click Discharge Reason drop-down and click reason.

5. Click Date of Deactivation calendar and click date.
6. Click Veteran drop-down and click status.
7. Click Marital Status drop-down and click status.
8. Click Pregnant drop-down and click status.
9. Click Living Arrangement drop-down and click arrangement.
10. Click Education drop-down and click status.
11. Click School Attendance Status drop-down and click status.
12. Click Employment Status drop-down and click status.
13. Click Source of income drop-down and click income.
14. Click Health Insurance drop-down and click insurance carrier.
15. Click SMI drop-down and click status.
16. Click SED drop-down and click status.
17. Click Codependent drop-down and click status.
18. Click Substance Abuse Problem and/or Mental Health Diagnosis drop-down and click status.
19. Additional fields will display for entry as needed.
20. Complete the entry/selection for the displayed required fields.



7. Client Project Participation

7.1 To add a client to a Project:

From the Client Dashboard:

1. Click Projects tab. Projects the Provider participates in and the client is eligible for are displayed.
2. Click Activate for a project to add the client to that project. Any project specific required fields are displayed for entry.
3. Enter the required fields and click Apply Status.

7.2 To remove a client from a Project:

From the Client Dashboard:

1. Click Projects tab. Projects the Provider participates in and the client is eligible for are displayed.
2. Click Status for the project. (Some projects will not have this button to remove clients as designed)
3. Click action Date calendar and click date.
4. Click Action Type field and click type. Additional required fields will be displayed.
5. Enter the required fields and click Apply Status.

8. Client Notes

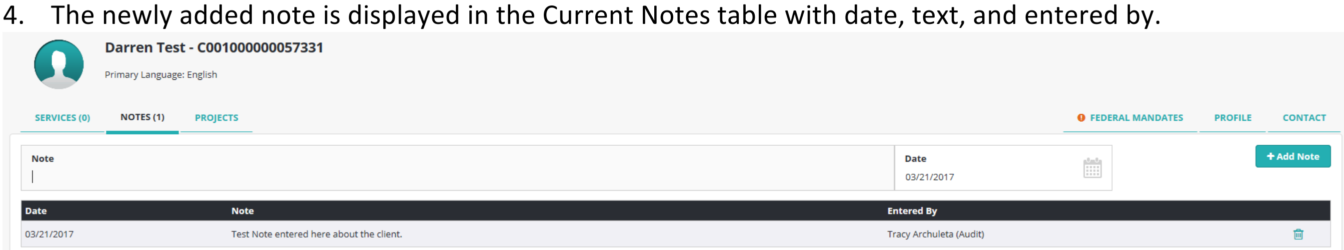
From the Client Dashboard:

1. Click Notes tab.
2. Current Notes for the client will display.

Tip: As notes are added the (0) on the tab will update.

8.1 To add a Note:

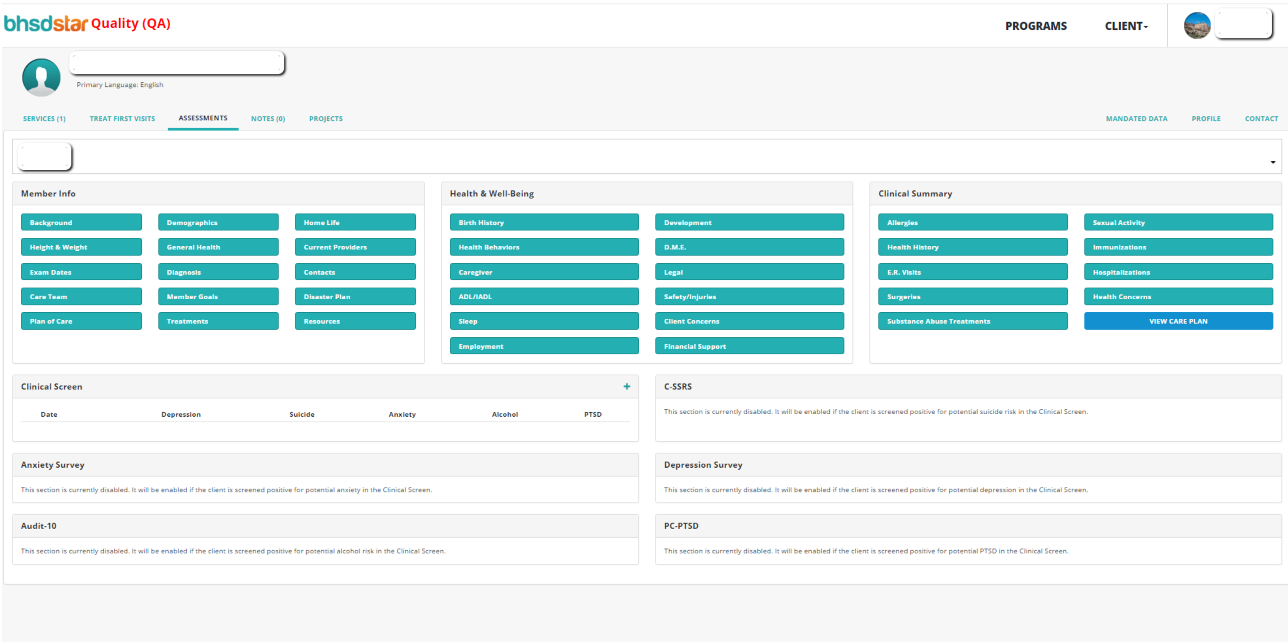
1. Click the Notes section and enter notes.
2. Click the Date calendar and click date.
3. Click Add Note.
4. The newly added note is displayed in the Current Notes table with date, text, and entered by.



9. Assessments

From the Client Dashboard:

1. Click Assessments tab.
2. Provider Location drop-down list is displayed at the top of the page. Users will be able to select any location they have access to.
3. Navigation buttons for Member Info, Health & Well-Being and Clinical Summary questionnaires are displayed underneath the Provider Location drop-down list.
4. Historical data for Clinical Screen, C-SSRS, Anxiety, Depression, Audit-10 and PC-PTSD Surveys are displayed towards the bottom of the page.



9.1 Enter/edit Member Info Questionnaires

1. Click the Background button in the Member Info section. Enter/edit Background information.
2. Click the Height & Weight button in the Member Info section. Enter/edit Height & Weight information.
3. Click the Exam Dates button in the Member Info section. Enter/edit Exam Dates information.
4. Click the Care Team button in the Member Info section. Enter/edit Care Team information.
5. Click the Plan of Care button in the Member Info section. Enter/edit Plan of Care information.
6. Click the Demographics button in the Member Info section. Enter/edit Demographics information.
7. Click the General Health button in the Member Info section. Enter/edit General Health information.
8. Click the Diagnosis button in the Member Info section. Enter/edit Diagnosis information.
9. Click the Member Goals button in the Member Info section. Enter/edit Member Goals information.
10. Click the Treatments button in the Member Info section. Enter/edit Treatments information.
11. Click the Home Life button in the Member Info section. Enter/edit Home Life information.
12. Click the Current Providers button in the Member Info section. Enter/edit Current Providers information.
13. Click the Contacts button in the Member Info section. Enter/edit Contacts information.
14. Click the Disaster Plan button in the Member Info section. Enter/edit Disaster Plan information.
15. Click the Resources button in the Member Info section. Enter/edit Resources information.

Tip: For each questionnaire, click Save to submit answers or Cancel to return to Assessments tab.

Tip: Within each questionnaire, validation will occur after clicking 'Save'. If any errors exist, an orange indicator will appear next to the question. Hover over the orange indicator to view the recommendation text.

9.2 Enter/edit Health & Well-Being Questionnaires

1. Click the Birth History button in the Health & Well-Being section. Enter/edit Birth History information.
2. Click the Health Behaviors button in the Health & Well-Being section. Enter/edit Health Behaviors information.
3. Click the Caregiver button in the Health & Well-Being section. Enter/edit Caregiver information.
4. Click the ADL/IADL button in the Health & Well-Being section. Enter/edit ADL/IADL information.
5. Click the Sleep button in the Health & Well-Being section. Enter/edit Sleep information.
6. Click the Employment button in the Health & Well-Being section. Enter/edit Employment information.
7. Click the Development button in the Health & Well-Being section. Enter/edit Development information.
8. Click the D.M.E. button in the Health & Well-Being section. Enter/edit D.M.E. information.
9. Click the Legal button in the Health & Well-Being section. Enter/edit Legal information.
10. Click the Safety/Injuries button in the Health & Well-Being section. Enter/edit Safety/Injuries information.
11. Click the Client Concerns button in the Health & Well-Being section. Enter/edit Client Concerns information.
12. Click the Financial Support button in the Health & Well-Being section. Enter/edit Financial Support information.

Tip: For each questionnaire, click Save to submit answers or Cancel to return to Assessments tab.

Tip: Within each questionnaire, validation will occur after clicking 'Save'. If any errors exist, an orange indicator will appear next to the question. Hover over the orange indicator to view the recommendation text.

9.3 Enter/edit Clinical Summary Questionnaires

1. Click the Allergies button in the Clinical Summary section. Enter/edit Allergies information.
2. Click the Health History button in the Clinical Summary section. Enter/edit Health History information.
3. Click the E.R. Visits button in the Clinical Summary section. Enter/edit E.R. Visits information.
4. Click the Surgeries button in the Clinical Summary section. Enter/edit Surgeries information.
5. Click the Substance Abuse Treatments button in the Clinical Summary section. Enter/edit Substance Abuse Treatments information.
6. Click the Sexual Activity button in the Clinical Summary section. Enter/edit Sexual Activity information.
7. Click the Immunizations button in the Clinical Summary section. Enter/edit Immunizations information.
8. Click the Hospitalizations button in the Clinical Summary section. Enter/edit Hospitalizations information.
9. Click the Health Concerns button in the Clinical Summary section. Enter/edit Health Concerns information.
10. Click the View Care Plan button in the Clinical Summary section. Enter/edit Care Plan information.

Tip: For each questionnaire, click Save to submit answers or Cancel to return to Assessments tab.

Tip: Within each questionnaire, validation will occur after clicking 'Save'. If any errors exist, an orange indicator will appear next to the question. Hover over the orange indicator to view the recommendation text.

9.4 Submit a new Clinical Screen Survey / view completed Clinical Screen Survey(s)

1. Click View to see the answers for the Clinical Screen Survey on that date (changes to answers on a completed survey are not allowed).
2. Click the green plus-sign in the top right of the Clinical Screen Survey box.
3. Answer Clinical Screen Survey questions. Click Save to submit answers or Cancel to return to Assessments tab.
   a. If a new Clinical Screen Survey was completed, an entry will appear in the Clinical Screen Survey box with the date of the survey along with an orange plus under any of the columns (Depression, Survey, Suicide, Anxiety, Alcohol and/or PTSD) that were flagged during after submitting the Clinical Survey answers.

Tip: Within each survey, validation will occur after clicking 'Save'. If any errors exist, an orange indicator will appear next to the question. Hover over the orange indicator to view the recommendation text.

9.5 Submit a new C-SSRS Survey / view completed C-SSRS Survey(s)

Note: This survey is only available if the client shows an orange plus-sign in the Suicide column of the Clinical Screen Survey. If the client does not show an orange plus-sign, users will see the following message in the C-SSRS Survey box: "This section is currently disabled. It will be enabled if the client is screened positive for potential suicide risk in the Clinical Screen."

1. Click View to see the answers for the C-SSRS Survey on that date (changes to answers on a completed survey are not allowed).
2. Click the green plus-sign in the top right of the C-SSRS Survey box.
3. Answer C-SSRS Survey questions. Click Save to submit answers or Cancel to return to Assessments tab.
   a. If a new C-SSRS Survey was completed, an entry will appear in the C-SSRS Survey box with the date of the survey and an orange plus-sign under the Risk column if the client screened positively for Suicide Risk.
   b. If the client screens positively for Suicide Risk, orange text that reads "At Risk Alert" will appear at the top of the C-SSRS Survey box.
   c. If the client screens positively for Suicide Risk, an orange banner will appear at the top of the Client Dashboard on all tabs (Notes, Projects, Mandated Data, etc.).

Tip: Within each survey, validation will occur after clicking 'Save'. If any errors exist, an orange indicator will appear next to the question. Hover over the orange indicator to view the recommendation text.

9.6 Submit a new Anxiety Survey / view completed Anxiety Survey(s)

Note: This survey is only available if the client shows an orange plus-sign in the Anxiety column of the Clinical Screen Survey. If the client does not show an orange plus-sign, users will see the following message in the Anxiety Survey box: "This section is currently disabled. It will be enabled if the client is screened positive for potential anxiety in the Clinical Screen."

1. A graph of previously-completed Anxiety Surveys is displayed by default.
2. Click Table in the Anxiety Survey box.
3. Click View to see the answers for the Anxiety Survey on that date (changes to answers on a completed survey are not allowed).

4. Click the green plus-sign in the top right of the Anxiety Survey box.
5. Answer Anxiety Survey questions. Click Save to submit answers or Cancel to return to Assessments tab.
    a. If a new Anxiety Survey was completed, an entry will appear in the Anxiety Survey box with the date of the survey, the score of the survey and the class category of the survey.

Tip: Within each survey, validation will occur after clicking 'Save'. If any errors exist, an orange indicator will appear next to the question. Hover over the orange indicator to view the recommendation text.

9.7 Submit a new Depression Survey / view completed Depression Survey(s)

Note: This survey is only available if the client shows an orange plus-sign in the Depression column of the Clinical Screen Survey. If the client does not show an orange plus-sign, users will see the following message in the Depression Survey box: "This section is currently disabled. It will be enabled if the client is screened positive for potential anxiety in the Clinical Screen."

1. A graph of previously-completed Depression Surveys is displayed by default.
2. Click Table in the Depression Survey box.
3. Click View to see the answers for the Depression Survey on that date (changes to answers on a completed survey are not allowed).
4. Click the green plus-sign in the top right of the Depression Survey box.
5. Answer Depression Survey questions. Click Save to submit answers or Cancel to return to Assessments tab.
    a. If a new Depression Survey was completed, an entry will appear in the Depression Survey box with the date of the survey, the score of the survey and the class category of the survey.

Tip: Within each survey, validation will occur after clicking 'Save'. If any errors exist, an orange indicator will appear next to the question. Hover over the orange indicator to view the recommendation text.

9.8 Submit a new Audit-10 Survey / view completed Audit-10 Survey(s)

Note: This survey is only available if the client shows an orange plus-sign in the Alcohol column of the Clinical Screen Survey. If the client does not show an orange plus-sign, users will see the following message in the Audit-10 Survey box: "This section is currently disabled. It will be enabled if the client is screened positive for potential anxiety in the Clinical Screen."

1. A graph of previously-completed Audit-10 Surveys is displayed by default.
2. Click Table in the Audit-10 Survey box.
3. Click View to see the answers for the Audit-10 Survey on that date (changes to answers on a completed survey are not allowed).
4. Click the green plus-sign in the top right of the Audit-10 Survey box.
5. Answer Audit-10 Survey questions. Click Save to submit answers or Cancel to return to Assessments tab.
    a. If a new Audit-10 Survey was completed, an entry will appear in the Audit-10 Survey box with the date of the survey, the score of the survey and a red exclamation icon under the Risk column if the client screened positively for Alcohol Dependency.
    b. If the client screened positively for Alcohol Dependency, an Alert will appear at the top of the Audit-10 Survey box. Click Alert to view the alert.

Tip: Within each survey, validation will occur after clicking 'Save'. If any errors exist, an orange indicator will appear next to the question. Hover over the orange indicator to view the recommendation text.

9.9 Submit a new PC-PTSD Survey / view completed Audit-10 Survey(s)

Note: This survey is only available if the client shows an orange plus-sign in the PTSD column of the Clinical Screen Survey. If the client does not show an orange plus-sign, users will see the following message in the PC-PTSD Survey box: "This section is currently disabled. It will be enabled if the client is screened positive for potential anxiety in the Clinical Screen."

6. A graph of previously-completed PC-PTSD Surveys is displayed by default.
7. Click Table in the PC-PTSD Survey box.
8. Click View to see the answers for the PC-PTSD Survey on that date (changes to answers on a completed survey are not allowed).
9. Click the green plus-sign in the top right of the PC-PTSD Survey box.
10. Answer PC-PTSD Survey questions. Click Save to submit answers or Cancel to return to Assessments tab.
    a. If a new PC-PTSD Survey was completed, an entry will appear in the PC-PTSD Survey box with the date of the survey, the score of the survey and an orange plus-sign under the Risk column if the client screened positively for PTSD risk.
    b. If the client screens positively for PTSD Risk, orange text that reads "At Risk Alert" will appear at the top of the PC-PTSD Survey box.

Tip: Within each survey, validation will occur after clicking 'Save'. If any errors exist, an orange indicator will appear next to the question. Hover over the orange indicator to view the recommendation text.

10. Services

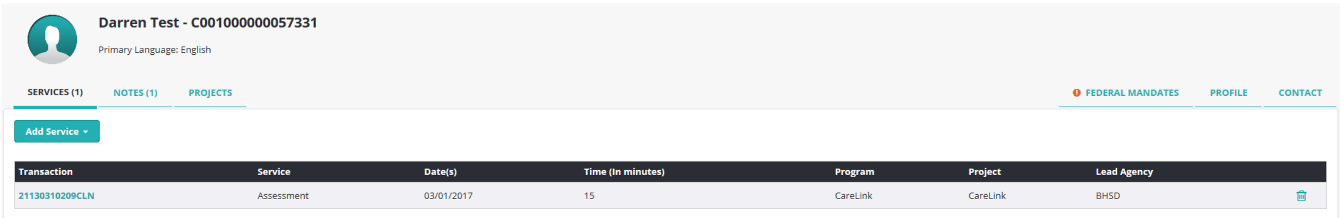
From the Client Dashboard:

1. Click Services tab.
2. Current Services for the client will display.

Tip: A Client must have Opted-In before Service Can be added.
Tip: As Services are added the (0) on the tab will update.

10.1 To add a Service:

1. Click Add Service drop-down and click service.
2. Click Date of Activity calendar and click date.
3. Click Type(s) and other required fields depending on Service selected.
4. Click Save.
5. Service is listed in the Service Table.

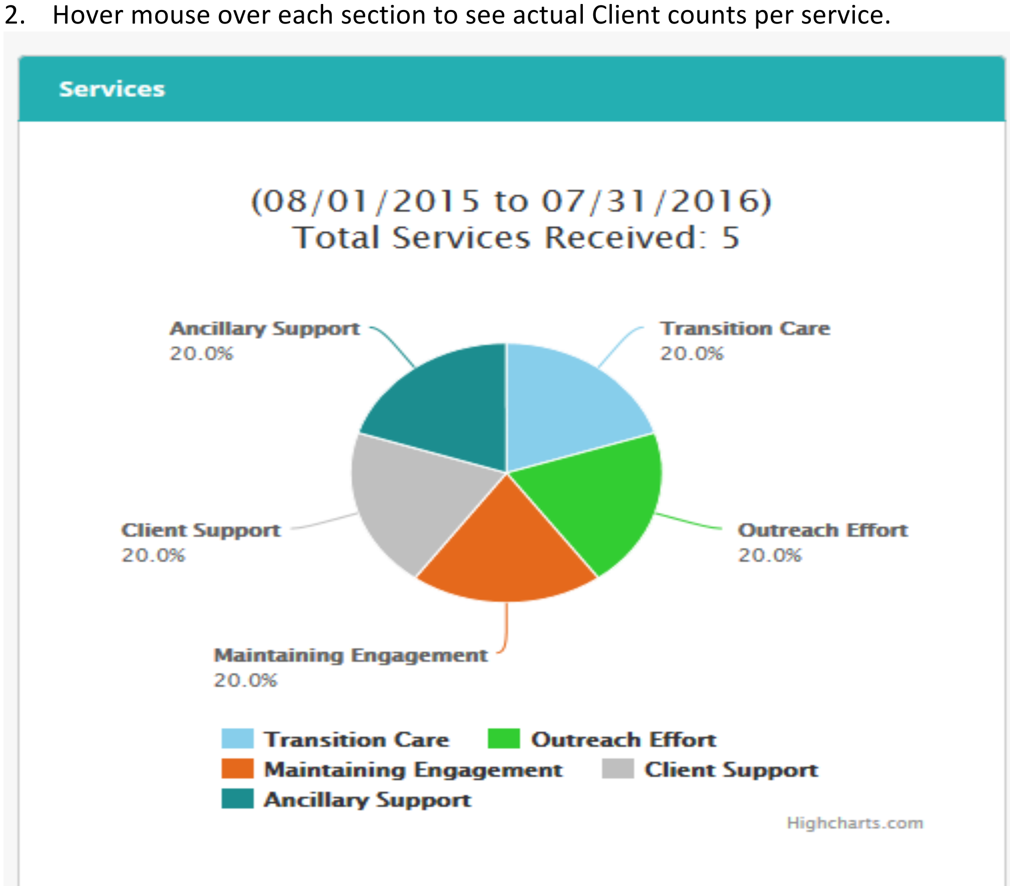


10.2 To delete a Services:

1. Click the Trash Can for a listed Service.
2. Click Yes, Delete the Record.
3. Service is no longer listed in the Service Table.

10.3 To View Service Graph:

1. Graph is displayed with all Client Services and their %s.
2. Hover mouse over each section to see actual Client counts per service.



11. Project Tracking Items

11.1 Data Uploads:

From the Home screen:

1. Click Take Action under Data Uploads.
2. Click File Type drop-down and click file type.
3. Click Browse and find the file on your PC.
4. Click Submit File.
5. Records accepted/unaccepted are displayed below.
6. Click the Errors (if indicated) to see any errored records.
7. Make the necessary corrections to the records and re-submit the file.

11.2 Reports

From the Home screen:

1. Click Run Report drop-down and click report.
2. Click/Select Report Criteria.
3. Click Run Report.
4. Report details are displayed.

11.3 Correct Failed Xerox Uploads

From the Home screen:

1. Click Take Action under Failed Uploads.
2. Click a Client ID listed.
3. Click Profile tab.
4. Make the necessary corrections and click Save.
5. The system will resend the record nightly.

11.4 Opt Status Updates

From the Home screen:

1. Click Take Action under Opt Status.
2. Individuals registered for CareLink but not yet Opted In or Out will be displayed.
3. Click the Client ID.
4. Client Dashboard is displayed.

12. Questions

For any questions email support@bhsdstar.org.