

Provider User Manual

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1. General Information

1.1. Definitions

BridgeCRM	Platypus System's base Client Information Management System
GLBTI	Gay Lesbian Bisexual Transgender Intersex
GP	General Practitioner
MDS	Minimum Data Set
MHNS	Mental Health Nurse Service
PTS	Psychological Therapy Services
PMHC	Primary Mental Health Services
Provider	Clinician subcontracted or employed by a supplier
Supplier	Alliance Lead contracted to Western Victoria PHN
WESTERN VICTORIA PHN Referral Point	Western Victorian Primary Health Network Referral Point facilitates the delivery of WESTERN VICTORIA PHN's Psychological Therapy Services
SPS	Suicide Prevention Service

1.2. Introduction

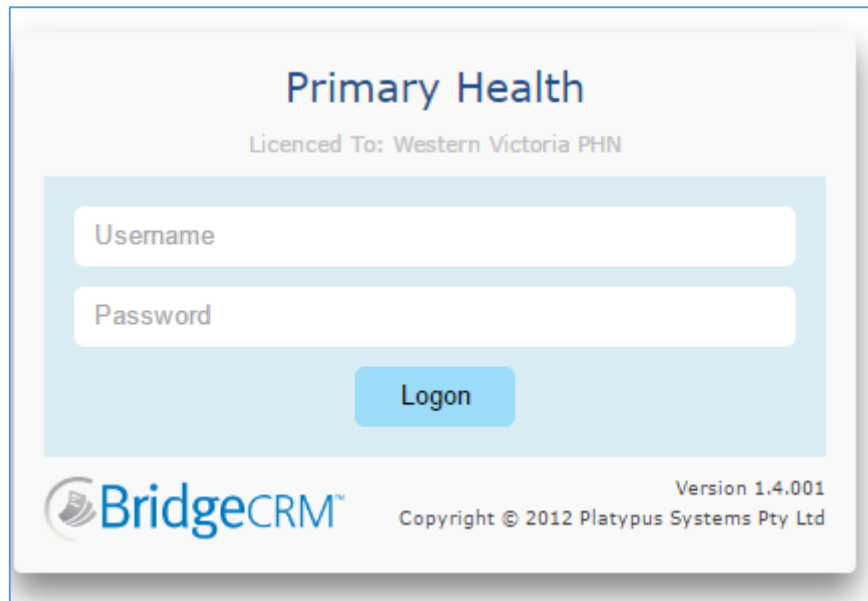
WESTERN VICTORIA PHN's Referral Point facilitates the delivery of focussed psychological strategies by accredited mental health practitioners to eligible consumers through the Psychological Therapy Services (PSYCHOLOGICAL THERAPY SERVICES).

Bridge CRM is a client information management system utilised by suppliers and providers who provide clinical services for WESTERN VICTORIA PHN's PSYCHOLOGICAL THERAPY SERVICES program.

Bridge CRM is accessed via a browser based software solution developed by Platypus Systems Pty Ltd for WESTERN VICTORIA PHN, for which the Referral Point team will provide individual login details.

1.3. Access – How to Login

In your browser, enter the address: <https://referralpoint.westvicphn.com.au>



Primary Health

Licensed To: Western Victoria PHN

Username

Password

Logon

BridgeCRM™ Version 1.4.001

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Enter your username and password provided. This information can be requested from the Referral Point team.

2. Home Screen

The screenshot shows the BridgeCRM Home Screen. At the top, there is a navigation bar with the following items: Home (highlighted), Primary Health (dropdown), Help, Profile, About, and Log Out. Below the navigation bar, there are three main dashboard sections:

- PTS Mental Health - My Referrals:**
 - Current: [26](#)
 - Invoices Not Yet Approved: [0](#)
 - Session Request Approval: [10](#)
 - No Session Entered: [8](#)
 - Referrals Not Yet Accepted: [1](#)
 - Self Generated Tax Invoice: [91](#)
- PMHC Mental Health - My Referrals:**
 - Current: [0](#)
 - Invoices Not Yet Approved: [0](#)
 - Session Request Approval: [0](#)
 - No Session Entered: [0](#)
 - Referrals Not Yet Accepted: [0](#)
 - Self Generated Tax Invoice: [0](#)
- My Profile:**
 - Last Availability Update: Never
 - Help Document(s) to Read: 0

There are 2 sections for your Referrals –

- **PTS Mental Health** - contains referrals received before 1 July 2017
- **PMHC Mental Health** - contains referrals received after the 1 July 2017

Within each of those dashboards there are 6 links:

Current	Displays the provider's referrals and provides links to each referral and its details – sessions etc. Referrals that have not yet accepted, do not appear here (see below).
Invoices Not Yet Approved	Displays a list of sessions submitted but not yet approved
Session Request Approval	Displays the provider's referrals which are pending session review approval
No Session Entered	Displays a list of referrals that have been accepted but where no session data has been entered.
Referrals Not Yet Accepted	Displays a list of referrals not yet accepted. When the referral is accepted (see 3.2 below) or session is entered the referral will move to the 'Current' dashboard item.
Self Generated Tax Invoice	Disregard this is Not Applicable

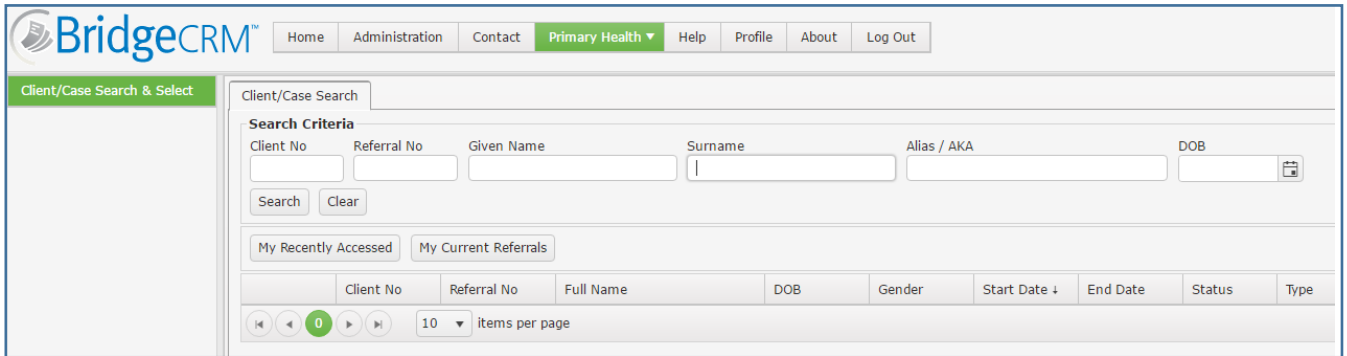
- My Profile.

Within this dashboard there are 2 links

Last Availability Update	This field shows when the provider last updated their availability. Clicking on this field take the provider to their calendar where they can update this information. See 5.3 for step-by-step instructions.
Help Document(s) to Read	This field shows that new documents have been uploaded by the Referral Point team which providers are required to acknowledge having read.

3. Caseload Management

The provider can access his/her referrals from the dashboard on the Home page:



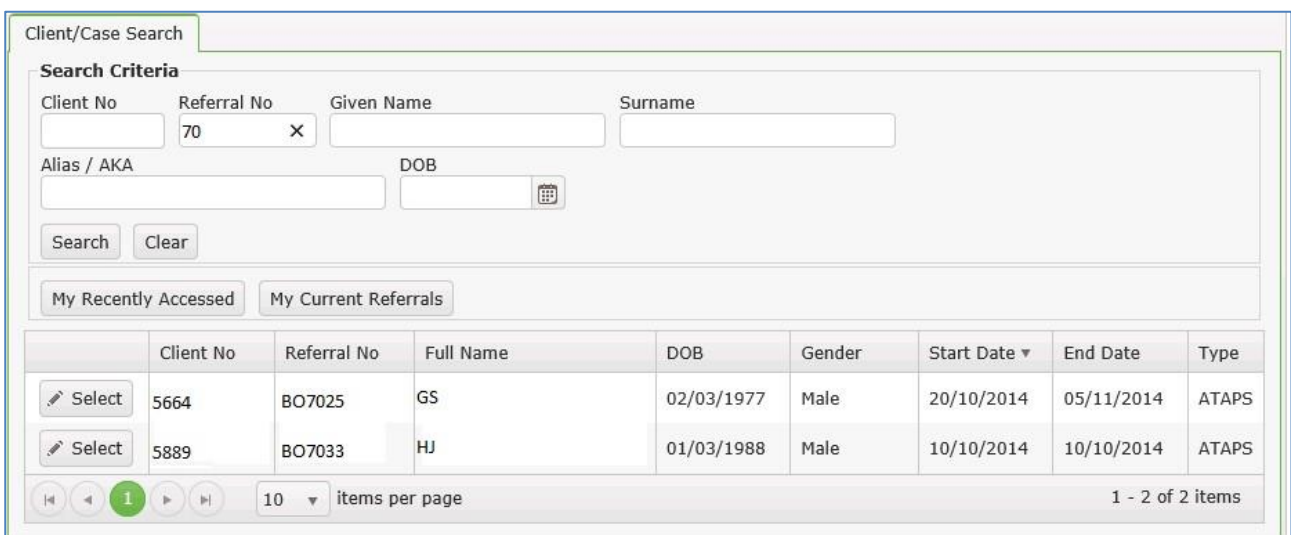
Through this menu item, the provider can access the “Client/Case Search & Select” screen.

On this screen, search by placing the cursor in any of the following fields:

Client No	The exact number must be entered.
Referral No	Any part of the Referral No.
Given Name	Any part of the client’s given name.
Surname	Any part of the client’s surname.
Alias / AKA	Any part of the alias.
DOB	The exact DOB.

After making an entry in one of the above fields, either press Enter or click on the “Search” button.

To make another search, either delete the previous entry or click on the “Clear” button.



When the referral is found, click on the “Select” button” to open the referral screen.

This will change the screen view to display the referral details.

The left hand pane provides additional menu items:

Client/Case Search & Select	Returns to the Search screen.
Client Details	Displays the client details – changes cannot be made by providers.
Notes	The provider as well as the Referral Point team can add notes regarding the referral.
Referral	Displays the referral details
Outcome Measure	The outcome measure scores can be added at the time the referral is received as well as during <u>treatment</u> and on conclusion of the referral.
Session Request	When allocated sessions have been used, additional sessions must be approved by the Referral Point team. The requests will appear on the dashboard of the provider as well as the dashboard of the Referral Point administrator.
Session	Displays the sessions for the referral.

3.1. Referral

The Referral screen has 2 Tabs:

- The referral tab shows the referral details as recorded from the original referral received by the Referral Point team.
The provider cannot make changes to the entries on this tab.
There is also a link to documents uploaded by the Referral Point team.

Also – Please note the ‘Status bar’ at the bottom of the screen showing: as below

Referral No	PTS 00.. etc
Client No	00.. etc
Client Name	Joe Blogg
Calendar YTD Sessions	Sessions used in the current calendar year (Note: referrals are valid from date of referral not calendar year)
Sessions Used	Total sessions used for this referral
Alert message in red	If the referral has expired or the referral is about to end (4 weeks or less to the end date), an alert message in red will appear in status bar area.

The screenshot shows the BridgeCRM interface with the 'Primary Health' menu selected. The left sidebar contains navigation options: Client/Case Search & Select, Access Permission, Client Details, Notes, Referral (highlighted), Outcome Measure, Sessions Request, and Session. The main content area has three tabs: Referral, Provider (circled in red), and Outcome. The 'Provider' tab is active, displaying a 'Save Details' button and a timestamp 'Record Saved - 4/07/2017 1:12:22 PM'. Below this, there are three fields: 'Accepted' with a dropdown menu set to 'Yes', 'First Session Booked Date' with a calendar icon and the value '08/11/2016', and 'No Session Reason' with a dropdown menu. A 'Details' section with a plus icon is visible below these fields. At the bottom of the form, another 'Save Details' button and timestamp are present.

The **Provider** tab (above) allows the provider to accept or reject the referral, add the first session booked date - or to add a reason that a first session has not yet been recorded.

When the referral is accepted, the referral is shifted from the My Referrals dashboard item, "Referrals Not Yet Accepted" to "Current". (see below)

My Referrals	
Current	2
Invoices Not Yet Approved	4
Pending Session Request Approval	1
No Session Entered	1
Referrals Not Yet Accepted	2
Self Generated Tax Invoice	5

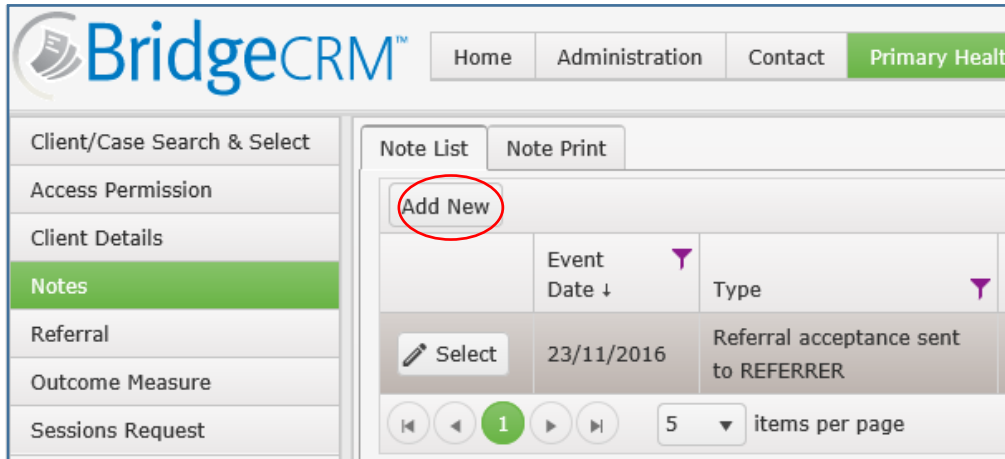
- The **Outcome** tab (below) allows the provider to close the referral:
 - select a conclusion from the drop down box
 - to add other comments in the Details box.

The screenshot shows the BridgeCRM interface with the 'Primary Health' menu selected. The left sidebar is the same as in the previous screenshot. The main content area has three tabs: Referral, Provider, and Outcome (circled in red). The 'Outcome' tab is active, displaying a 'Save Details' button and a timestamp 'Record Saved - 4/07/2017 1:12:22 PM'. Below this, there are two fields: 'Conclusion Date' with a calendar icon and 'Conclusion' with a dropdown menu. A 'Clinical Details' section contains a 'Provider / Clinician Diagnosis' field. Below this is a 'Details' section with a plus icon. At the bottom of the form, another 'Save Details' button and timestamp are present.

When the conclusion is saved (& referral closed), the referral no longer appears on the provider's "My Referrals" dashboard. If the referral needs to be reopened, then please contact the Referral Point team on 1300 221 493

3.2. Notes

Both the Referral Point team and providers can add notes where the usual “Details” text box is inadequate - (e.g. On the referral screen).

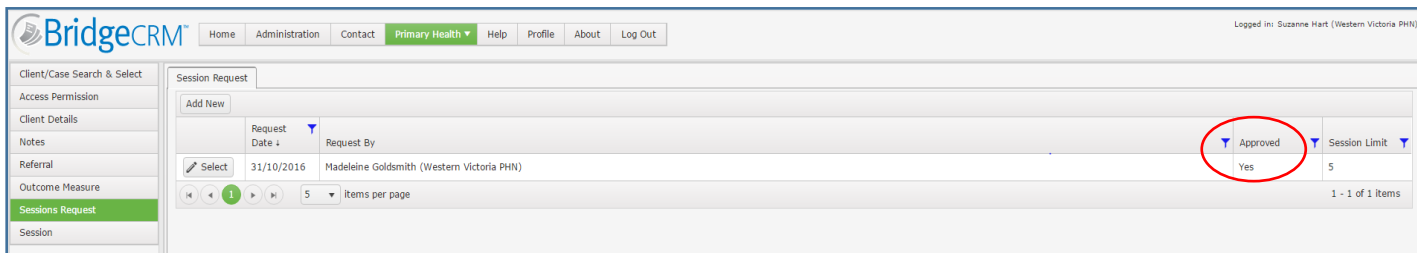


3.3. Sessions Request

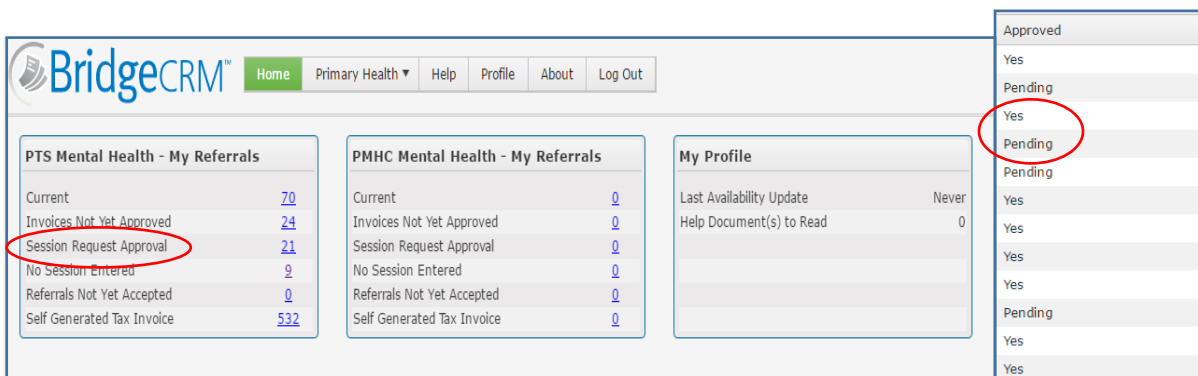
When a referral is assigned to a provider, the number of sessions that are allocated to the referral is set according to the rules defined in the Provider Guidelines.

When the allocated sessions 1-5 have been used (and entered in the Bridge CRM system) the provider must log a Session Request and send an Outcome Report to the referring GP.

To do this, click on the “Add New” button and provide information in the “Details” box to allow the Referral Point team to assess the request.



*Further sessions will only be approved once the Referral Point team have received a Referral Review Form from the referring GP.



When you click on the Session Request Approval tab on your Home Page you will see which have been approved ‘Yes’ and which are still ‘Pending’. The client’s name will be visible beside each entry also.

3.4. Outcome Measure

Outcome measures must be entered into Bridge at both the start and at the end of treatment. The provider can add additional outcome measure scores at any other time and indicate the “collection point” -

- Referral (where the referrer has provided an initial score)
- Treatment (at the time of any session)
- Completion (at the time of closure of referral)

When the provider enters a session, there will be a warning message if either:

- No outcome measure has been entered for the client
- No outcome measure has been entered in the last 2 weeks

Collection Date	Collection Point	K10	DASS 21	DASS 42
21/06/2017	Treatment	39		

3.5. Session

The “Session” screen displays the sessions already entered and allows the provider to add new sessions.

Session Date	Attended Status
03/07/2017	Attended

Enter the Session Date, Type and the Attended Status.

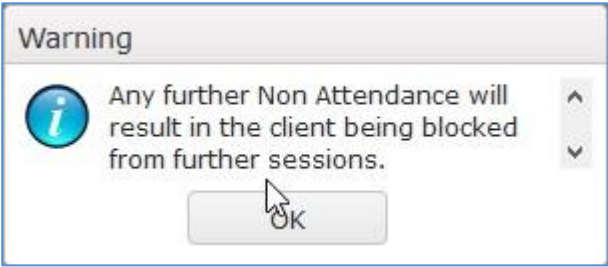
- For an “Attended” session, further fields will appear and must be filled.

Calendar YTD Sessions: 5 Sessions Used: 6 of 10

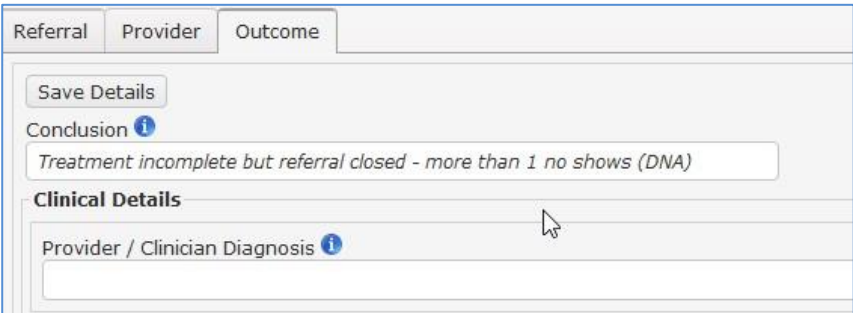
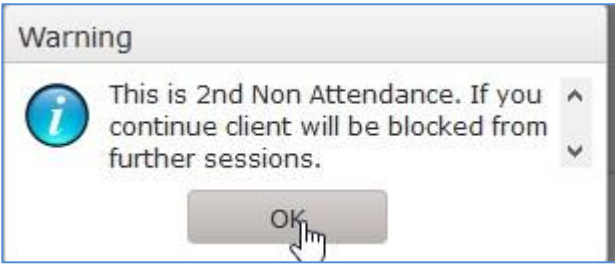
Also, when the session has been saved, the new session then appears at the top of the session list and status bar at the bottom of the screen updates the session information.

- If the session Attended Status is “Did Not Attend” then a message is displayed.

In this case, click on the “OK” button, enter any relevant remarks in the Details box and then click on the “Save Details” button.



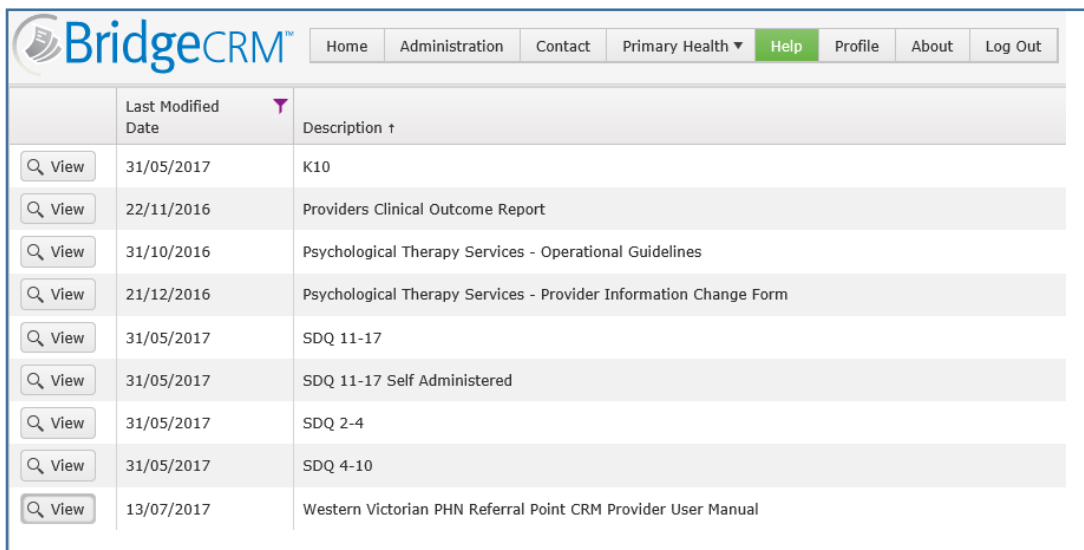
- If a second “Did Not Attend” session is entered, the following message appears.



If the session is then saved, then no more sessions will be able to be entered, the conclusion will be automatically added into the Outcome box and the referral will no longer appear on the provider’s dashboard.

4. Help

This user manual can be found on the Help screen



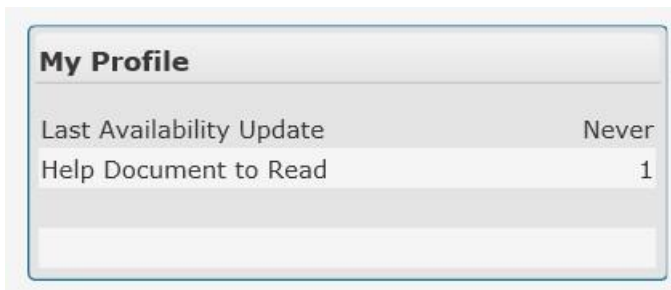
The screenshot shows the BridgeCRM interface with the 'Help' menu item selected. Below the navigation bar is a table listing various documents. Each row includes a 'View' button, the 'Last Modified Date', and the 'Description'.

	Last Modified Date	Description
View	31/05/2017	K10
View	22/11/2016	Providers Clinical Outcome Report
View	31/10/2016	Psychological Therapy Services - Operational Guidelines
View	21/12/2016	Psychological Therapy Services - Provider Information Change Form
View	31/05/2017	SDQ 11-17
View	31/05/2017	SDQ 11-17 Self Administered
View	31/05/2017	SDQ 2-4
View	31/05/2017	SDQ 4-10
View	13/07/2017	Western Victorian PHN Referral Point CRM Provider User Manual

In future, other documents may be uploaded - e.g. one page instruction sheets.

Yet other documents may be added which will require acknowledgement from the provider that the documents have been read.

The “My Profile” dashboard includes advice to users that they may need to acknowledge that they have read identified documents.



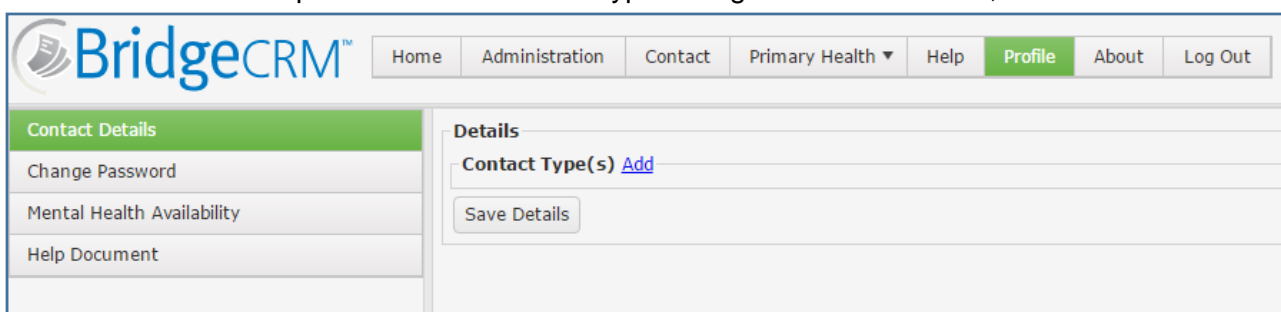
The screenshot shows the 'My Profile' dashboard with a table indicating document tracking information.

My Profile	
Last Availability Update	Never
Help Document to Read	1

5. Profile

5.1. Contact Details

This screen allows the provider to add contact types – e.g. An email address, etc.



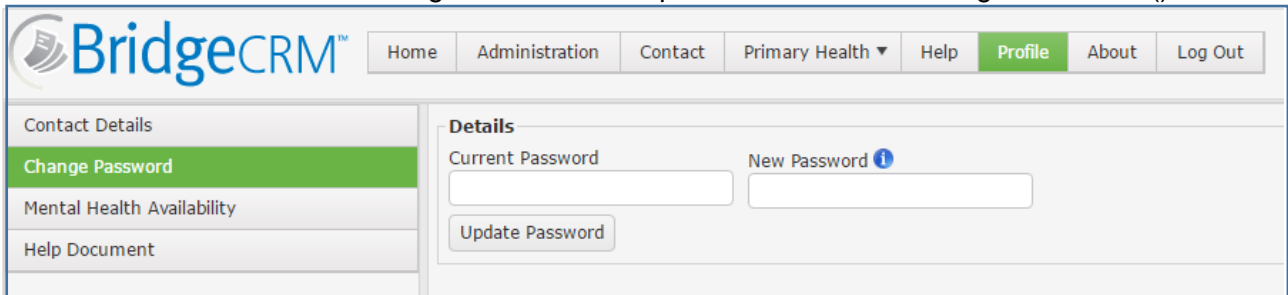
The screenshot shows the BridgeCRM interface with the 'Profile' menu item selected. The 'Contact Details' section is active, displaying a form to add contact types.

Contact Details	Details
Change Password	Contact Type(s) Add
Mental Health Availability	<input type="button" value="Save Details"/>
Help Document	

1.1. Change Password

If you need to change the password for the system, you will need the current password, and the new password must adhere to the following requirements:

Minimum of 6 characters including at least 1 non alphanumeric character e.g. !@#\$%^&*()



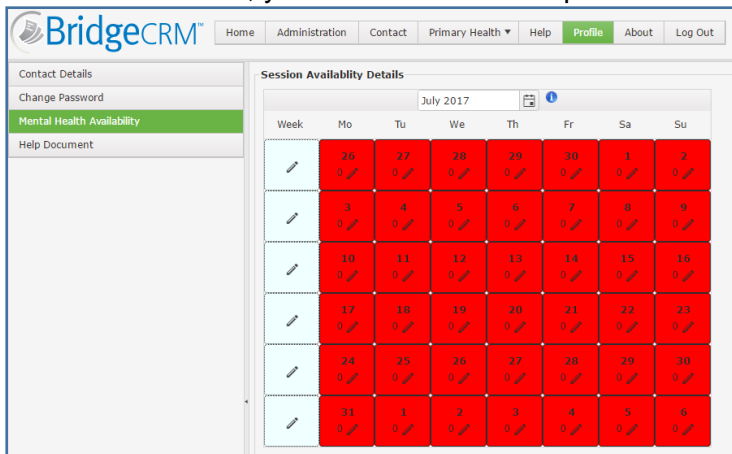
The screenshot shows the BridgeCRM interface with the 'Profile' menu selected. On the left, a sidebar contains 'Contact Details', 'Change Password' (highlighted), 'Mental Health Availability', and 'Help Document'. The main area is titled 'Details' and contains two input fields: 'Current Password' and 'New Password'. Below these fields is an 'Update Password' button.

If you forget your login details, contact the Referral Point team – 1300 221 493

1.2. Availability

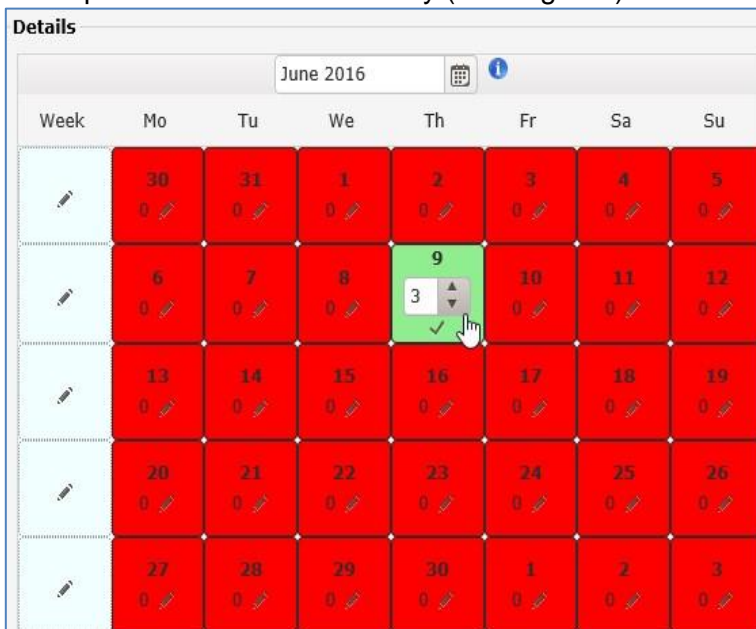
Each user can add their availability under their profile

- a. To edit a date, you can select the edit pencil icon



The screenshot shows the 'Session Availability Details' page for July 2017. It features a calendar grid with columns for days of the week (Mo to Su) and rows for weeks. Each date cell contains a number and a pencil icon for editing. The background of the calendar is red, indicating no availability.

- b. After selecting the edit icon, you can change the sessions available. Once completed select the tick icon to commit the change. The data will be saved and background updated to reflect availability (red or green).



The screenshot shows the 'Details' page for June 2016. It features a calendar grid with columns for days of the week (Mo to Su) and rows for weeks. A date (9th) is highlighted in green, and a small dialog box is open over it, showing the number '3' and a tick icon. The background of the calendar is red, indicating no availability.

The “My Profile” dashboard now contains a new section to advise users when they last used their availability.

My Profile	
Last Availability Update	1 Weeks, 3 days
Help Document(s) to Read	0