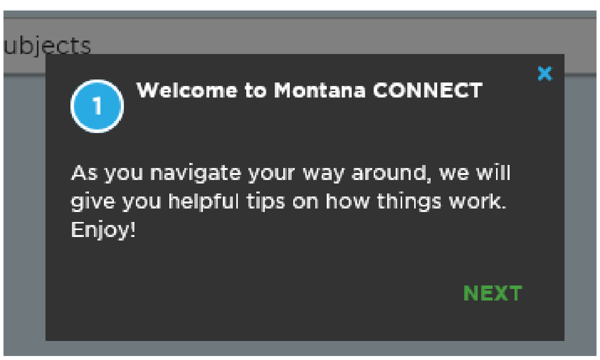
CONNECT Quick Start Guide

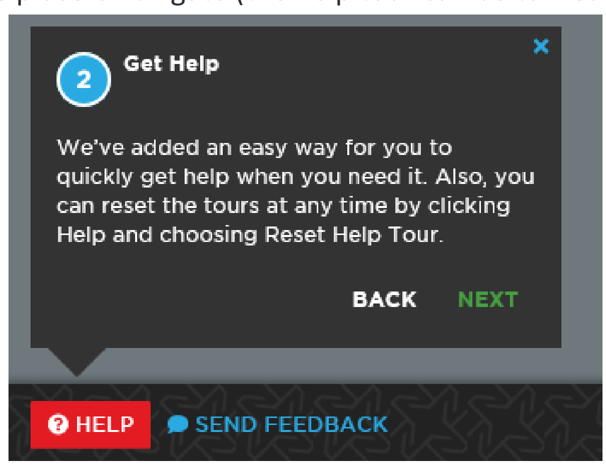
Initial Login

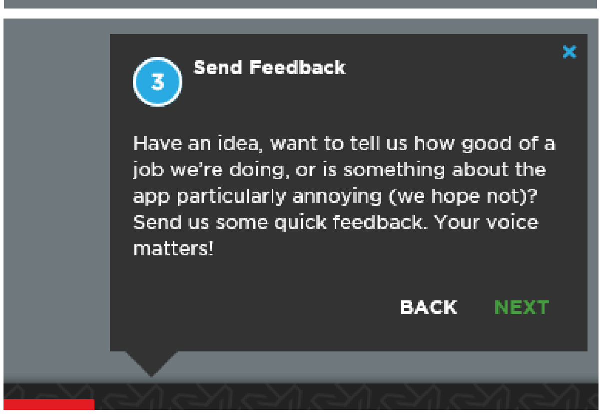
- The new URL for all Montana users is https://casemanager.noblesg.com/mt-state-connect
- Your login credentials are the same as before - if you need to reset your password, you can do so from the landing page
- When you sign in for the first time, you will be prompted to sign an MOU as a user (this is a new feature - users will sign the MOU annually)
- Your agency's gatekeeper will be prompted to sign a new MOU for your agency (the system will keep track of the MOU and remind your gatekeeper when it's coming due). You will not be able to access your referrals until the MOU is signed.
- **Important note:** *No other agency will be able to send referrals to your agency until your MOU is signed! You will not be visible without a valid MOU.*
- Once your agency's MOU is signed, please have your gatekeeper review the agency account information that was entered by your local CONNECT team member (if you did not give the information to your team member, please fill out the form (CONNECT Agency Account Form 20190914) and send it to Megan Grotzke or your local CONNECT team member.
- If you captured any hard copies of the ROI during the system down time (Friday-Sunday), please send the referrals as soon as possible. Also enter any referral status updates that took place and backdate them to reflect the date of the change.

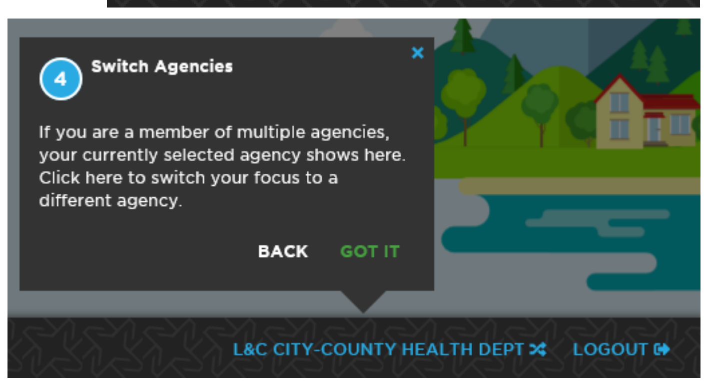
Navigating the System – Sending Referrals

- **Wizard tools / help text**
  The system has a number of wizard tools designed to help users navigate (the help tour can be turned off and back on at any time via the help menu):

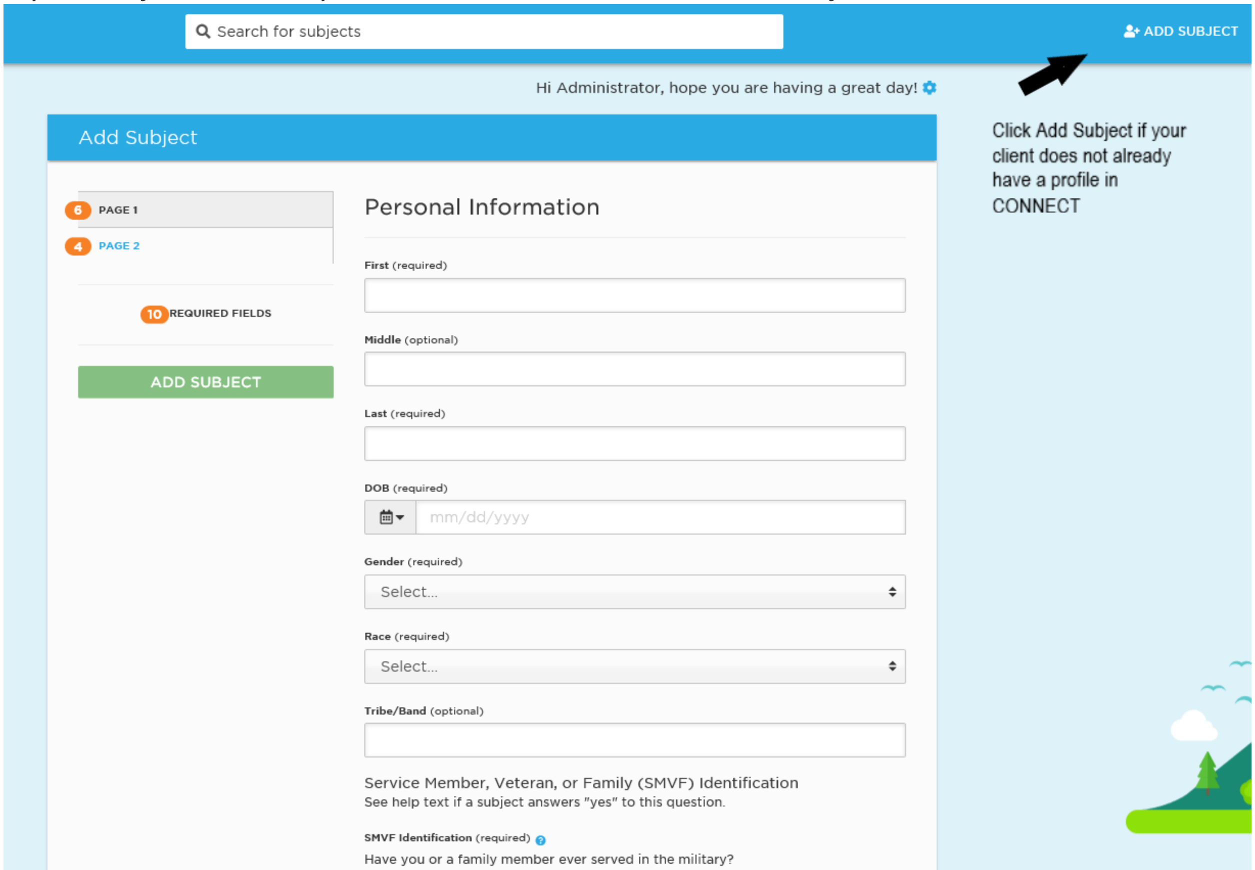




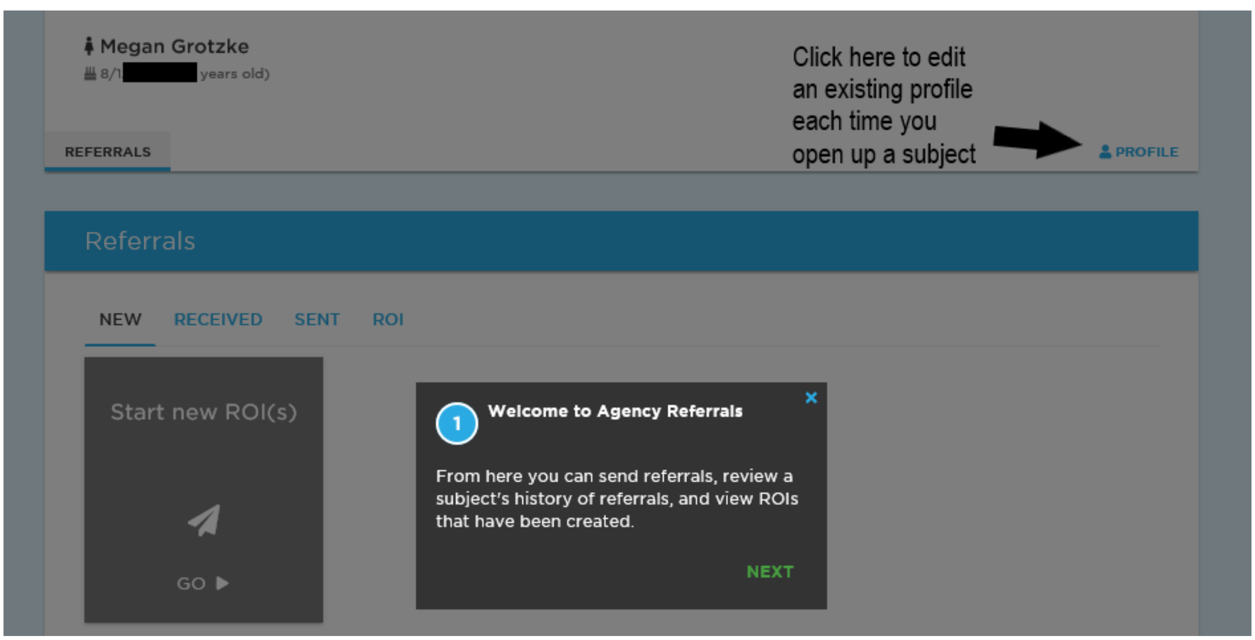




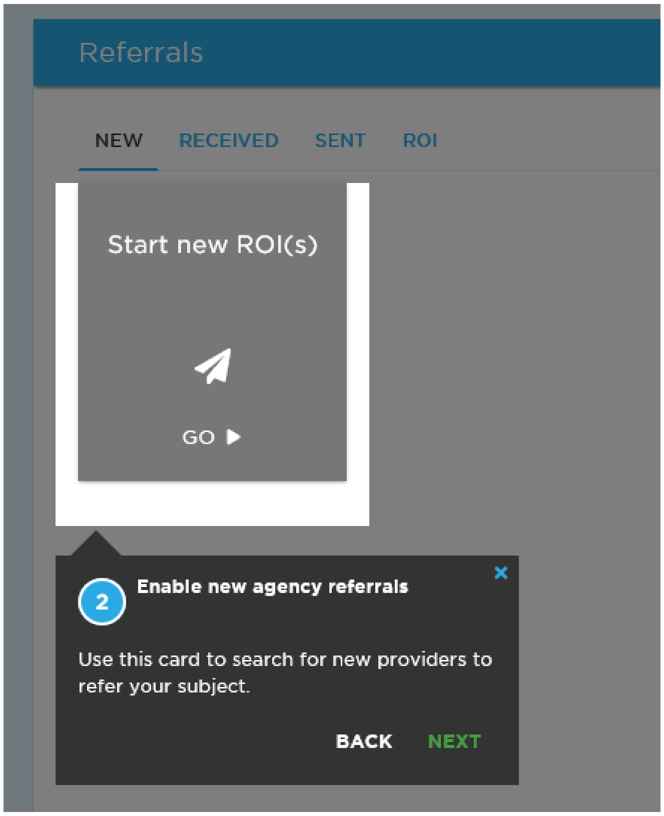
- **Setting up a subject's profile**
  - When working in a subject's profile, things look a bit different than what you're used to. *Always remember to use the search box to see if a subject exists before creating a new profile.*
- If your subject does not yet exist in CONNECT, click the Add Subject button:



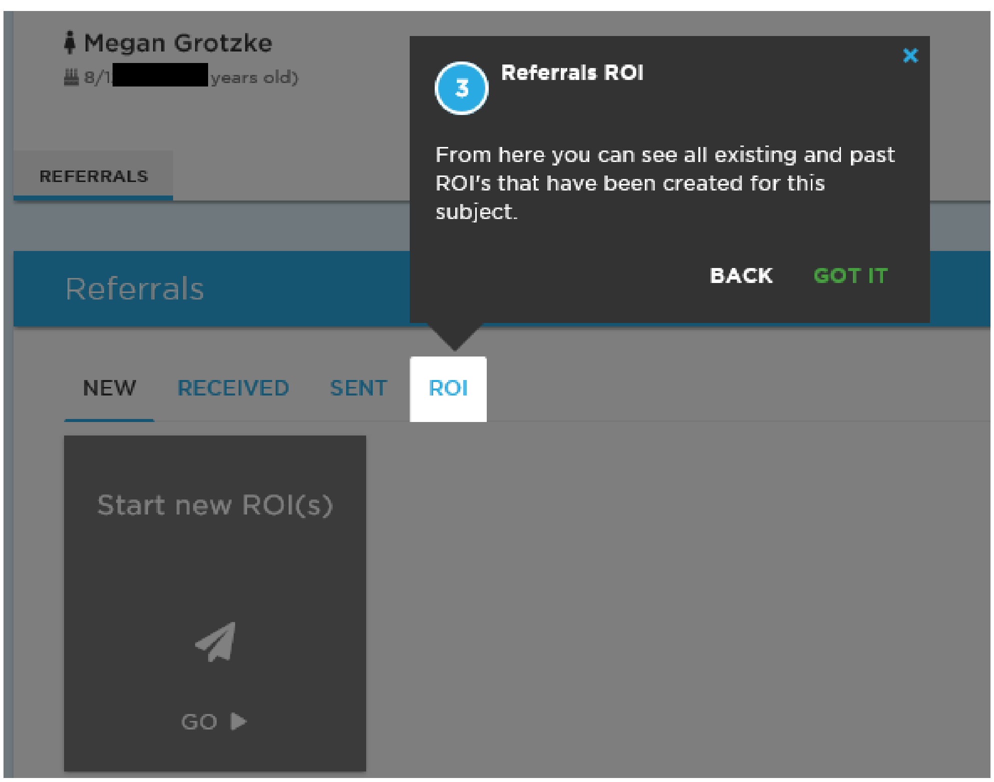
- **Setting up a Release of Information (ROI)**
  If you open an existing subject, you will see this screen. Be sure to review your subject's information by clicking on the Profile button in the right corner of the screen (accuracy is important for the next steps, so please be thorough when filling out the profile).



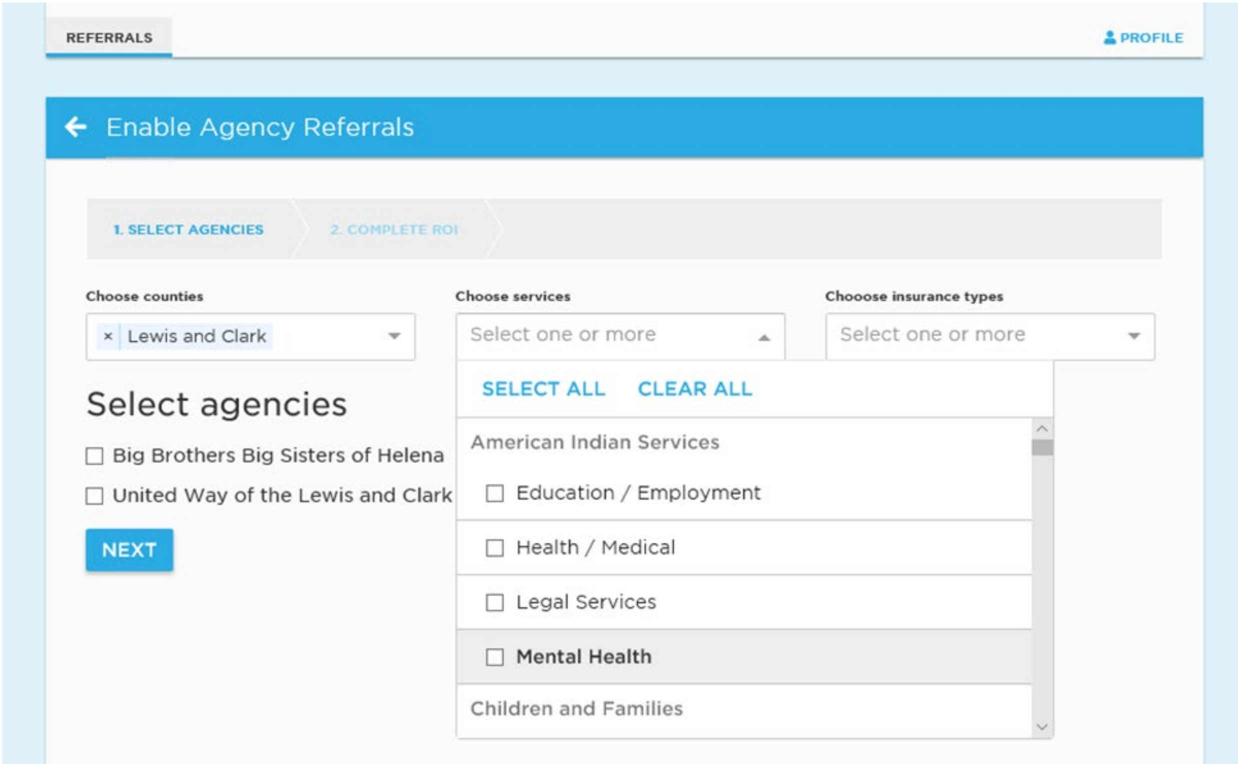
- To set up a new Release of Information, click on the Start new ROI(s) card in the New tab under Referrals.



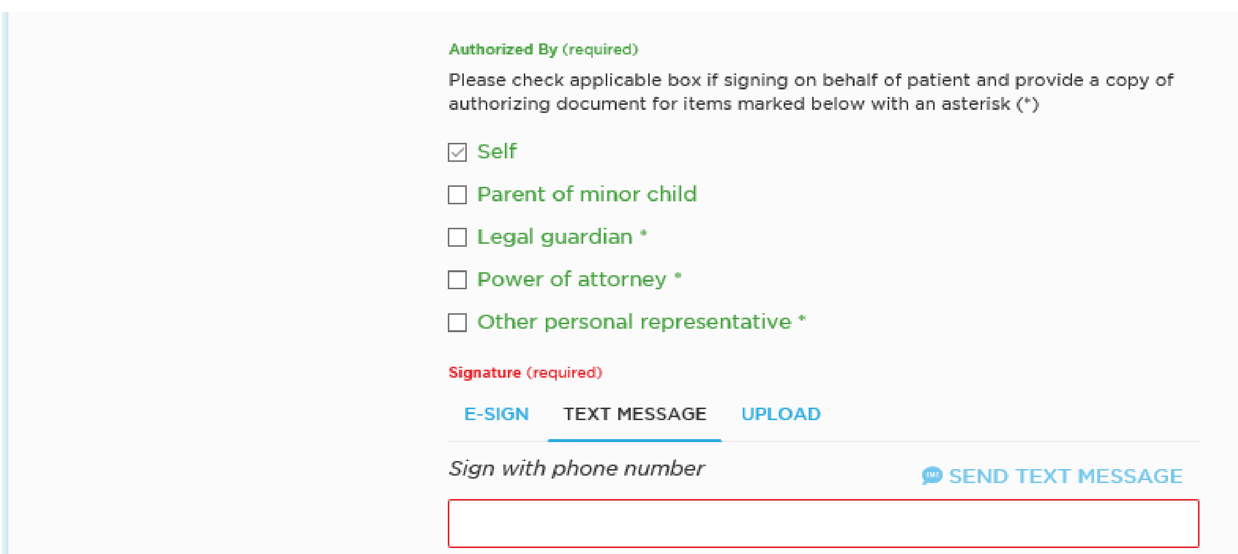
- Once you set up a new ROI, you will be able to view it in the ROI tab. A new feature forces medical ROIs to split off from other providers, so it's possible that you will see more than one ROI in the tab if you included medical providers in your list of referral partners.



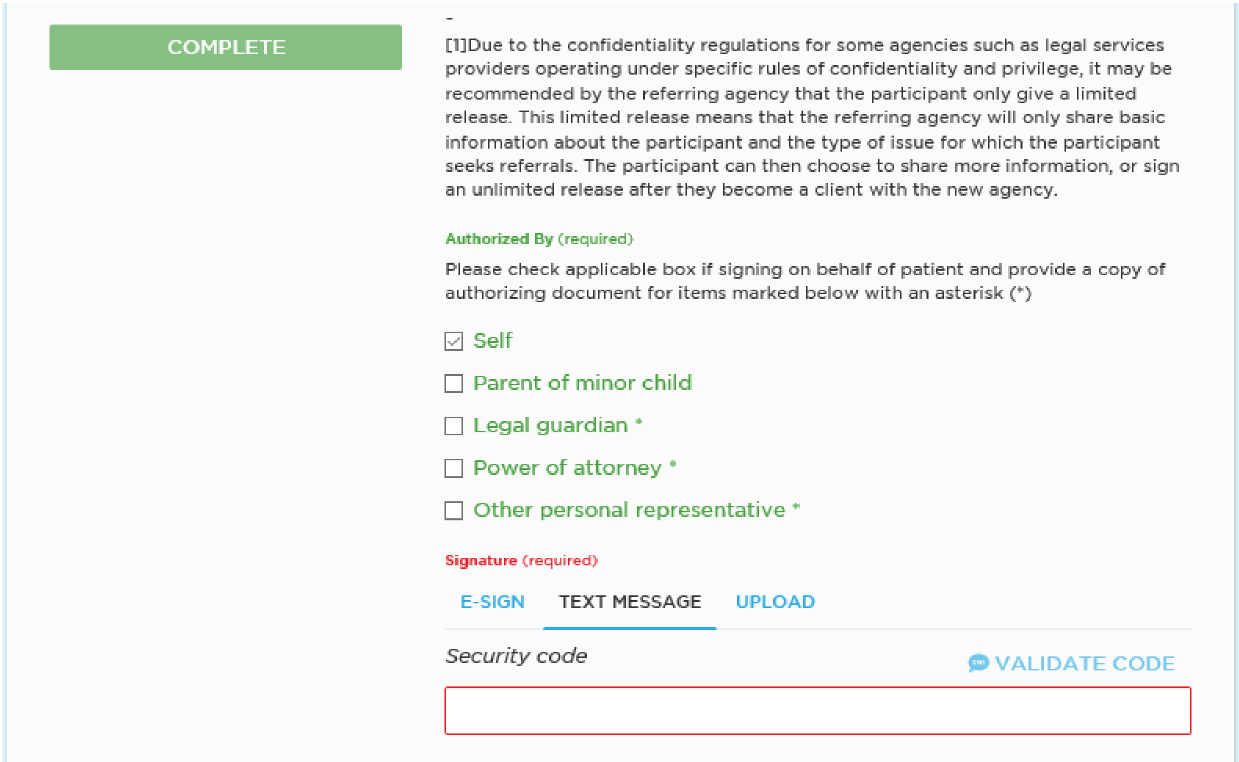
- Once in the ROI screen, you will be able to select a number of options to find the services you're looking for (please keep in mind that until your partners have signed their MOU in the new system, they will not be visible - reach out to them if they're not showing up!). Here's an example:



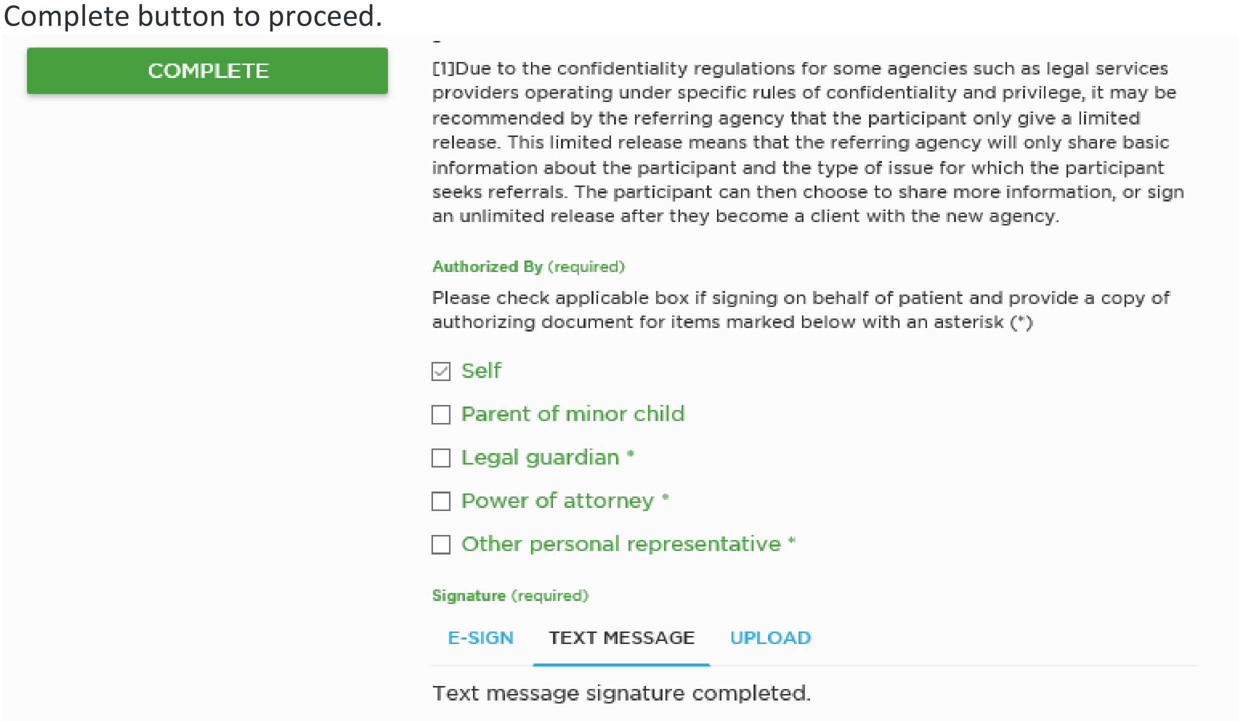
- You now have multiple options for capturing a client's signature on the ROI. A client can e-sign by typing his or her initials and checking a confirmation box, signing via text, or signing a hard copy of the ROI and uploading it into the system as a PDF.
- Sign by text message is an exciting new option, as your client does not have to be present to give permission. Simply select the text message option under Signature to get started.
- The client gives you their cell phone number and you enter it in the field, clicking Send Text Message:



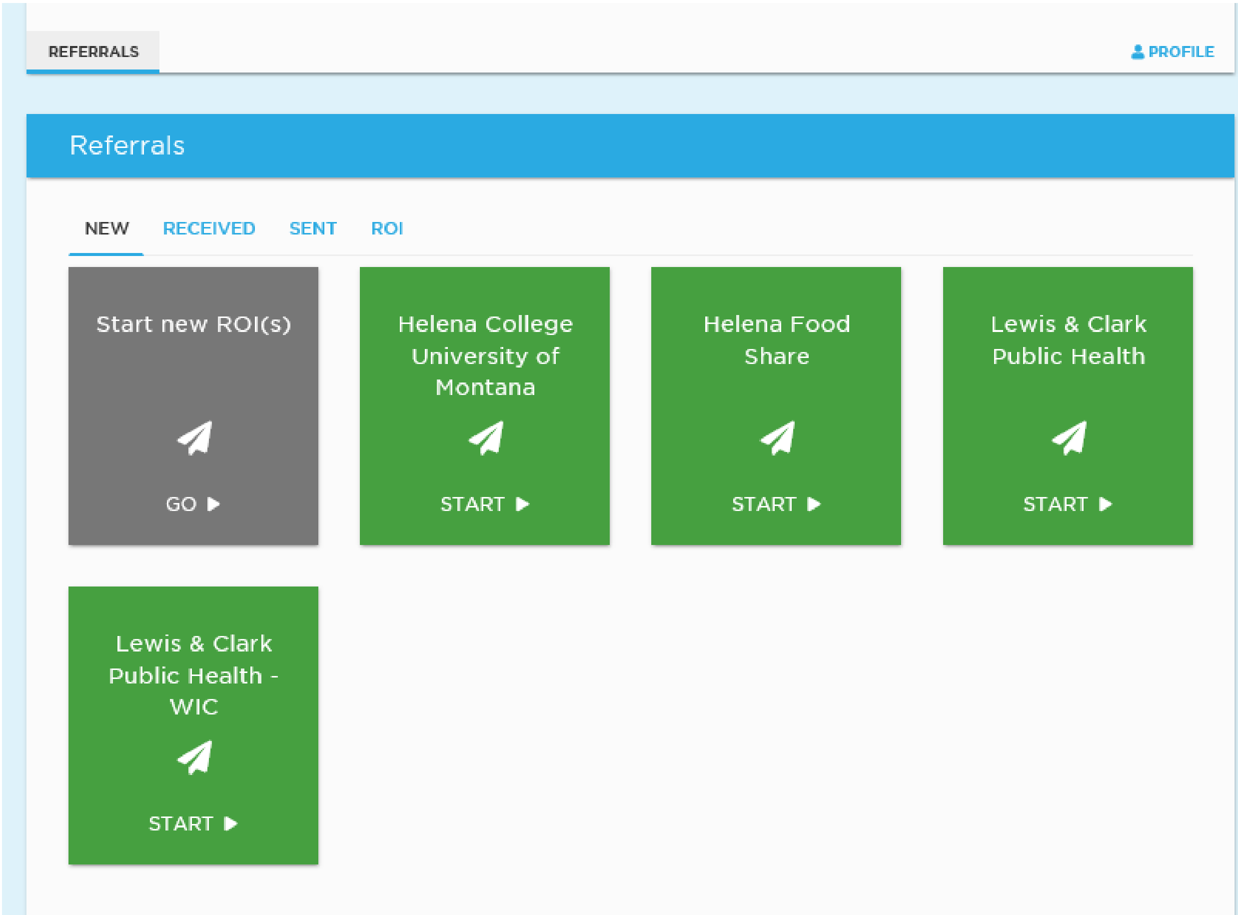
- The client then receives a text from Noble with some information, asking them to respond "Yes" to proceed. If so, the client receives a 4-digit validation code that they give to you over the phone.



- When you enter the code and click Validate Code, the process is finished and you can click the green Complete button to proceed.

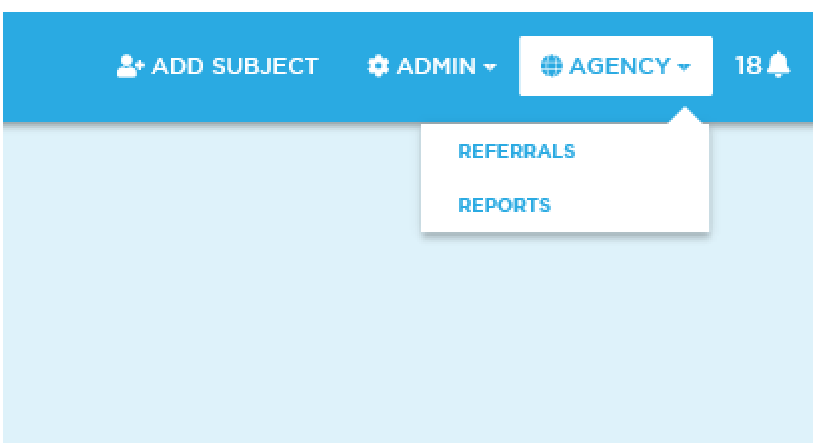


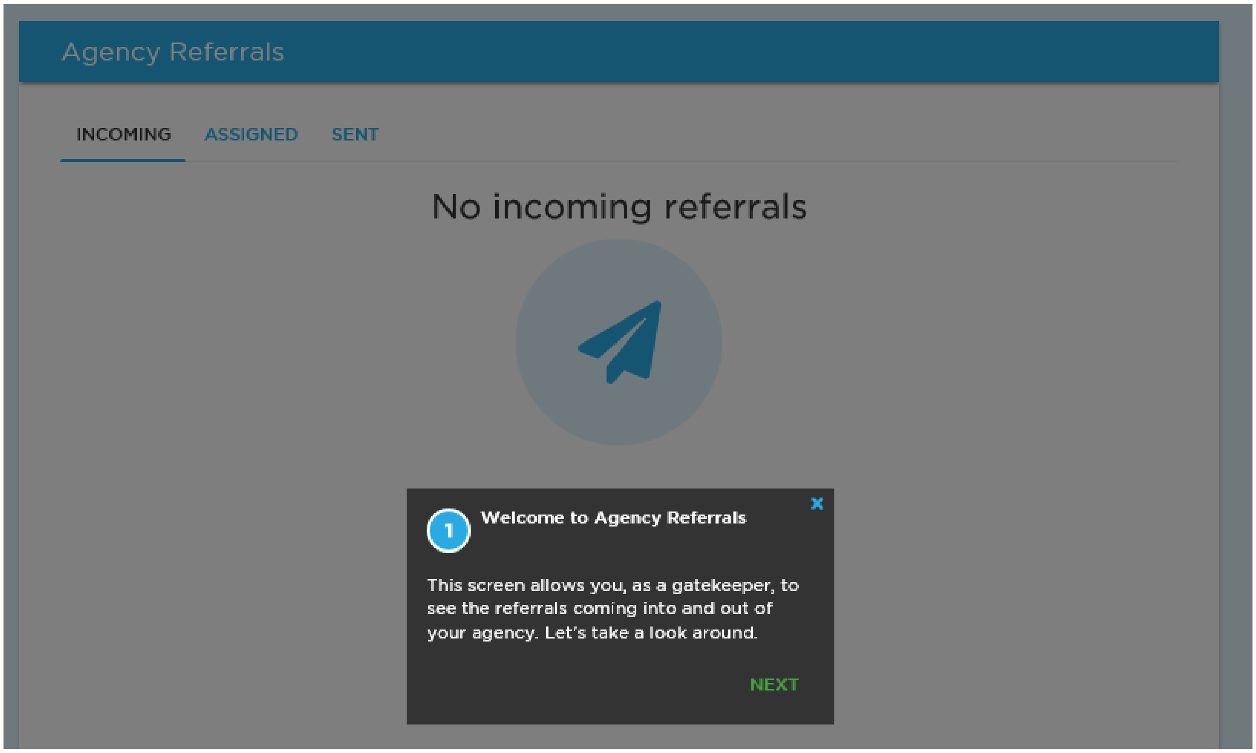
- Once the ROI is signed, no matter the method, you will see a card for each of the referral partners selected on the ROI. Click the green card to start the referral for that agency; once you have sent the referral, it will show up in the Sent tab.



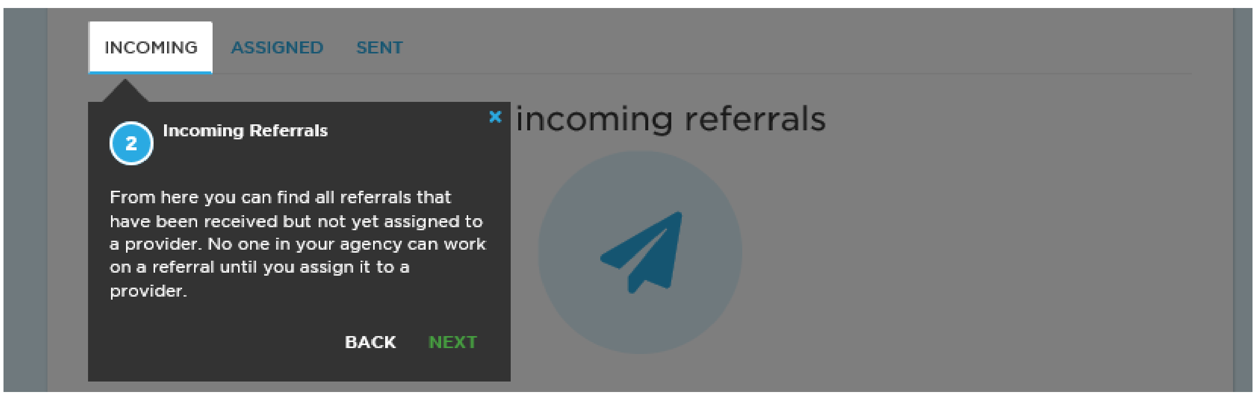
Navigating the System – Receiving Referrals

- **Viewing your agency's referrals**
  Log in and navigate to Referrals via your agency drop-down menu:

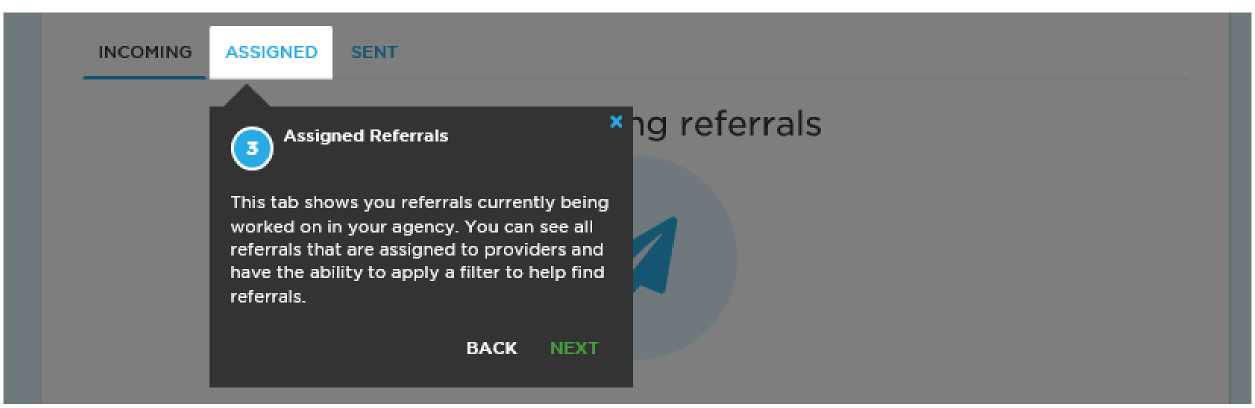




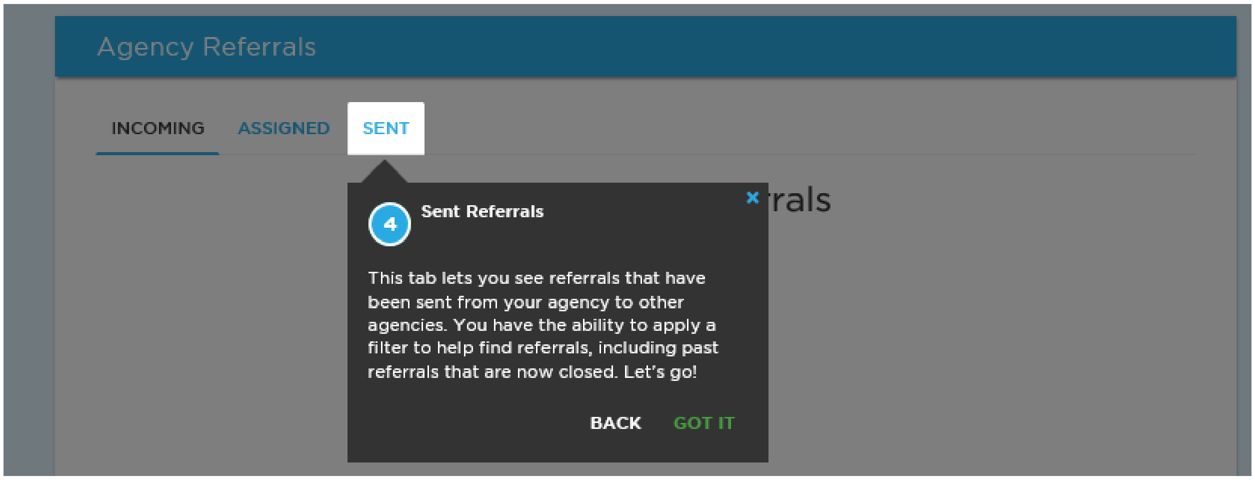
- If you are a gatekeeper, you will see 3 tabs: incoming, assigned, and sent. The gatekeeper or gatekeepers receive all the incoming referrals (they are notified via system-generated email when a referral is sent from another agency), and they are responsible for logging in, reviewing the incoming referrals, and assigning the referrals to a provider.



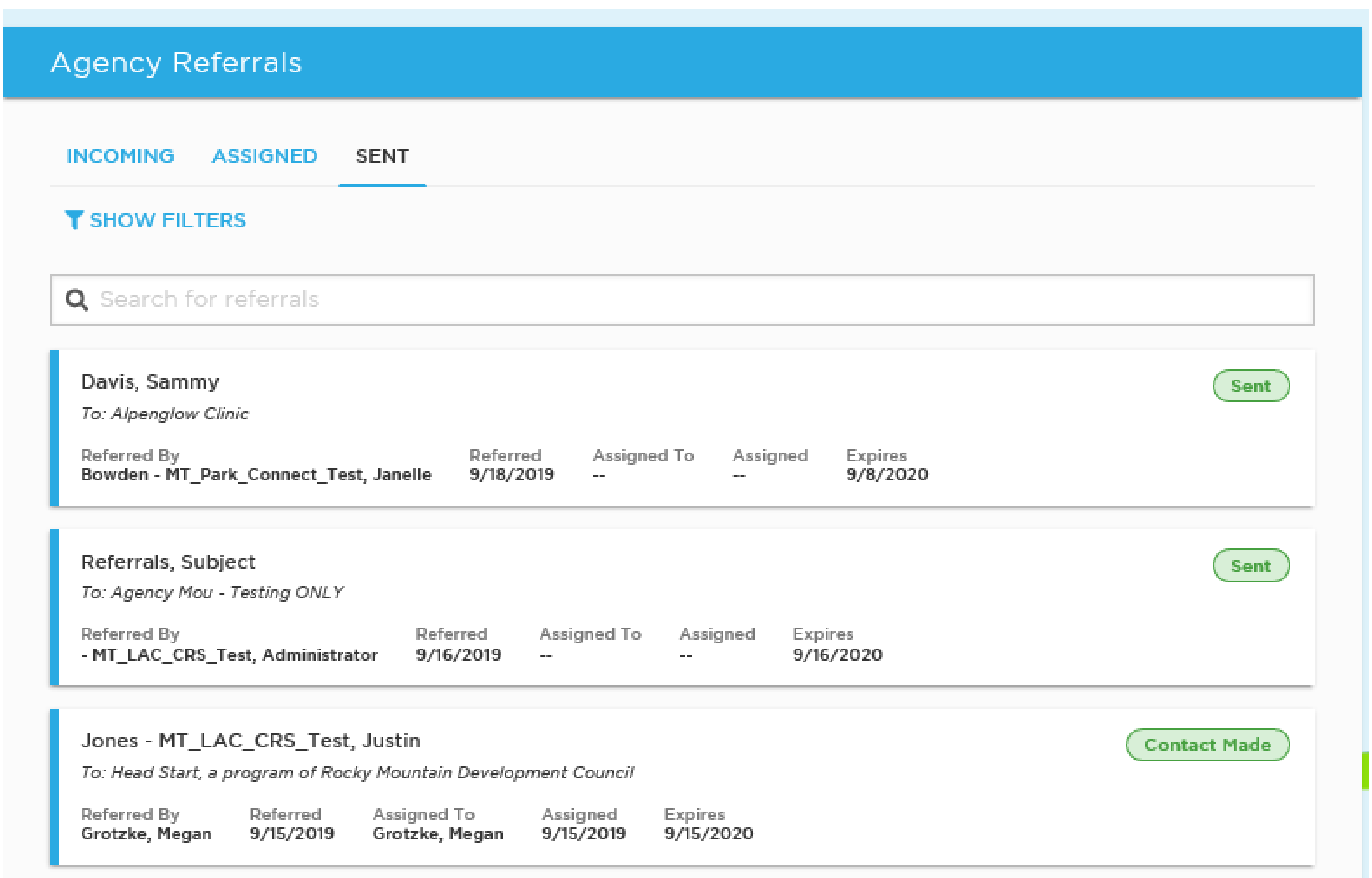
- If you are a provider, you will only see 2 tabs: assigned and sent. When a gatekeeper assigns a referral to a provider, a system-generated email is sent to notify the provider. Once the provider reviews the referral, contact should be attempted and logged on the referral status page.



- The Sent Referrals tab allows you to see referrals that have been sent from your agency to partner agencies. You have the ability to filter the referrals to find what you're looking for, even if the referral has been closed.

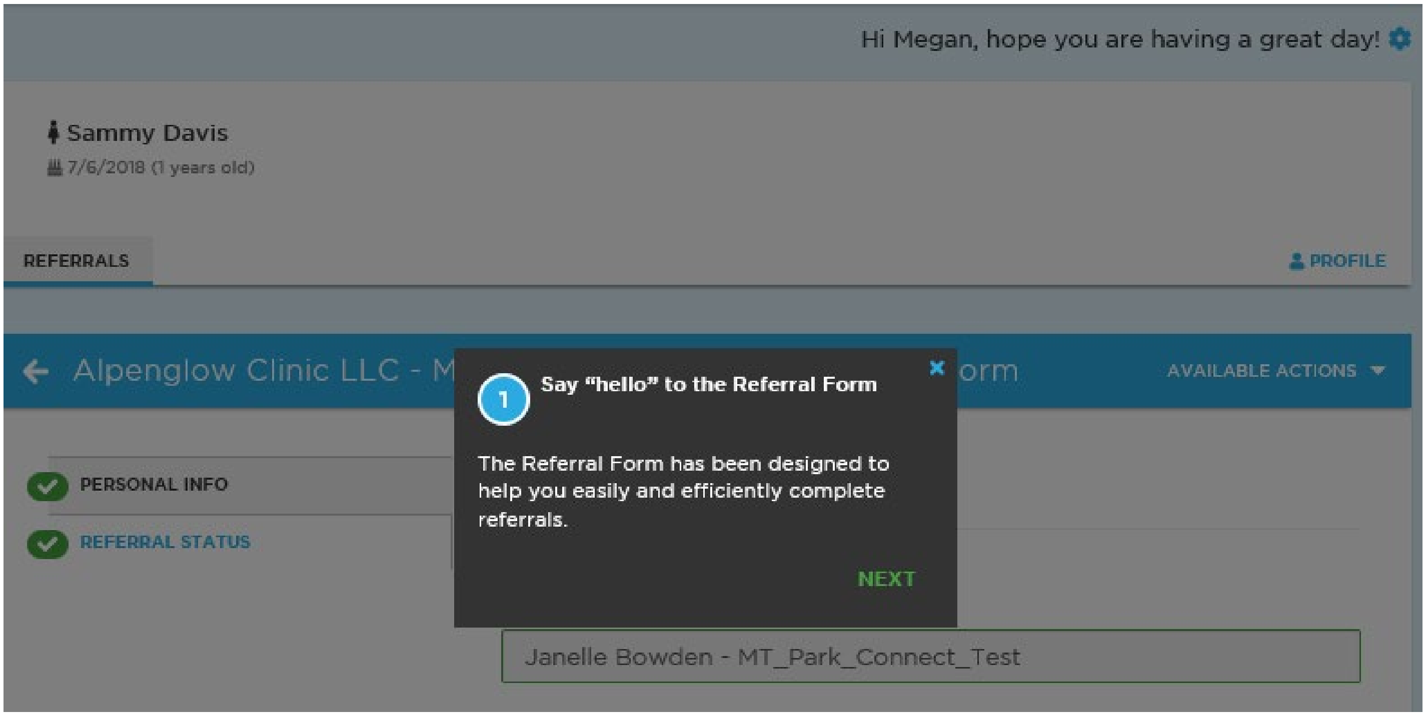


- The badges that appear on the right of each referral card show the current status: sent/received, contact made, open, closed, etc. To view the details of the referral, simply click on the card to open it up.

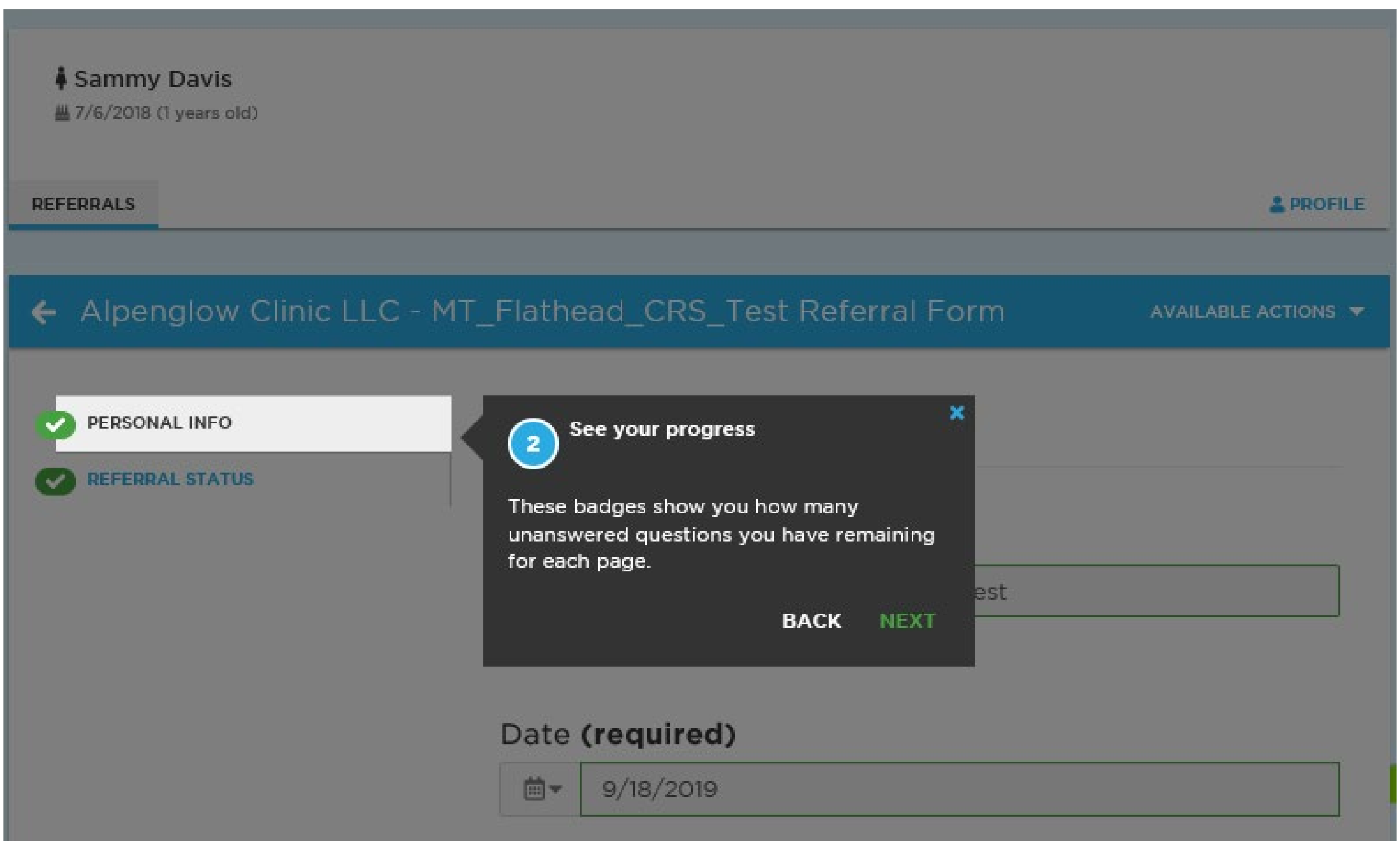


Navigating the System – Referral Forms

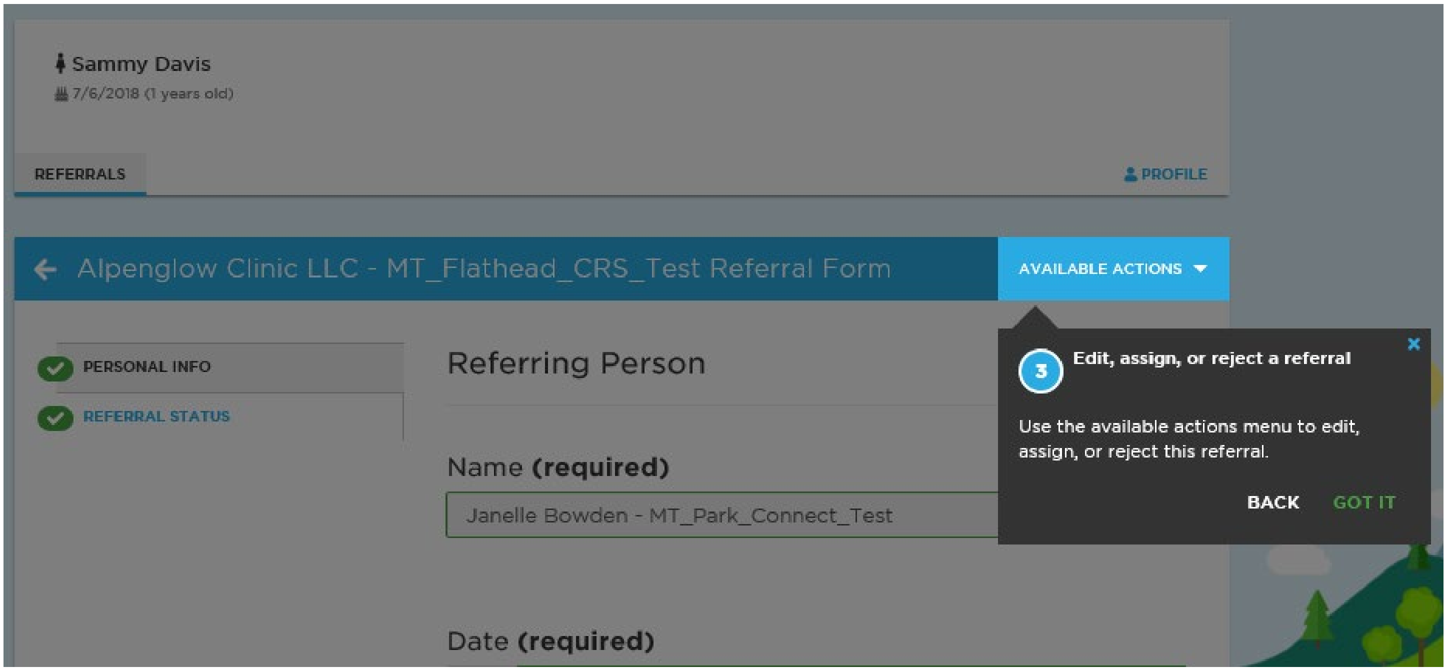
- **Working with Referral Forms**
  Another wizard tool will walk you through the referral form – personal info populates from the subject's profile, but be sure to review it for accuracy each time.



- If you have unanswered questions that are required to complete the form, a badge will appear next to the title of each page in the form.



- The Available Actions tab allows you to edit, assign, or reject a referral.



Navigating the System – Dashboard Notifications

- **Your dashboard**
  You will get notifications about referrals and status updates in your dashboard – click on the bell icon to view your notifications (most recent at the top) and dismiss them as you address each item.