

CONNECT New User Training

Welcome to the CONNECT Referral System self-guided training! This one-page document will help guide you through the new user training. If there are questions remaining after the training, you may reach out to your local administrator or contact the CONNECT State Team for assistance.

- 1.) Head to our [training page](#) and download the “New User” guide. This PDF will detail all that of the steps for “Gatekeepers” and “Providers in the live CONNECT system. Keep this PDF at hand when you begin to use the system so that you may refer to it as needed.
- 2.) Watch our YouTube video which details the referral process:
https://www.youtube.com/watch?v=nBgi2Q6ApwU&feature=emb_title
- 3.) After you have the PDF New User Guide and have watched the video, log into the demo site and try creating a mock referral yourself. The demo log-in information is included on our website but is also here for your convenience:
 - a. Demo Website: <https://cms.noblesg.com/mt-state-connect-demo>
 - b. Username: Connectdemoregion1@mt.gov
 - c. Password: ConnectMT20!
- 4.) Below is a suggested path to follow for creating the mock referral. You may select other organizations if desired:
 - a. Select “Lewis & Clark County Government- City County Health Department Services” as your agency
 - b. Create a new Client
 - i. This information can be completely made up. As this is the demo site do opt use actual client information.
 - c. Once the Client is created, select one or more programs to refer the new subject to
 - d. Sign the ROI for the new subject
 - i. You will see many options for signing the ROI. Feel free to use all of them to familiarize yourself. You may use your personal email or cell number to see how signing the ROI that way looks from the client’s perspective.
 - e. Send the referral to the one or more programs for which you signed the ROI for.
 - f. Change your agency from “Lewis & Clark County Government- City County Health Department Services” to one of the programs where you just sent a referral (such as “Montana Quit Line”).
 - g. Navigate the referral completion with mock information. This is so that you can have a visual of what this process looks like.
 - h. Feel free to continue and create mock Clients and referrals and navigate the many referral options.
 - i. Click on the reporting tab to see how reporting parameters differ from that of administrative users.

Note: If you experience issues, please be sure to relay that to the State CONNECT Team at:

CONNECT@mt.gov .