## Table of Contents

**HOW TO USE THIS GUIDE** ....................................................................................................................... 3

**CHILDREN’S CONNECT** ......................................................................................................................... 4

**SIGN UP & SET UP** ................................................................................................................................. 4

**LOG IN** ..................................................................................................................................................... 6

**WELCOME TO CONNECT (HOME PAGE)** .............................................................................................. 7

**CHART MESSAGES** ................................................................................................................................. 10

**CLINICAL REVIEW (PATIENT CHART)** .................................................................................................... 11

**SNAPSHOT REPORTS** ............................................................................................................................... 15

**CHART REVIEW** ....................................................................................................................................... 16

**UPLOAD DOCUMENT** ............................................................................................................................... 20

**SCHEDULING** ......................................................................................................................................... 22

**EVENT MONITOR** ...................................................................................................................................... 23

**IN BASKET (MESSAGING)** ....................................................................................................................... 26

**READ BROADCAST MESSAGES** ............................................................................................................... 27

**LOGGING OUT OR SECURING YOUR SCREEN** ......................................................................................... 28

**GLOSSARY** ................................................................................................................................................. 30
How to use this guide

This symbol indicates additional documentation is available online. Click the symbol to open the document. You can also click the document title here to open it.

Watch this training video: COURSE### - Title of Video

Click the icon or the video title to view.

This symbol indicates important details about the process. For example, you must do this before taking another action.

This symbol indicates an alternative way to do something, tips & tricks, shortcuts, or hacks.

This symbol is used to indicate features, functionality, or other changes and additions to the system, such as with an upgrade.
CHILDREN’S CONNECT

Sign Up & Set Up

1. Go to https://connect.childrenscolorado.org, click Request New Account, and complete the School Health Services Clinician application
   i. If you work in multiple schools or districts, click Add to add more districts/schools

<table>
<thead>
<tr>
<th>District(s) &amp; School(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Add] School District(s)</td>
</tr>
<tr>
<td>![Add] School(s) (Enter name the individual school(s) you work with.)</td>
</tr>
</tbody>
</table>

b. You will receive a user ID and temporary password within 14 business days
   i. You will be required to change your password the first time you log in

2. Ensure your internet browser is ready to access Connect
   a. You may use a desktop, laptop, or tablet to access Connect
   b. Use the most current version of any of the following browsers:
      • Internet Explorer
      • Safari
      • Chrome
      • Firefox

   o Children’s Colorado Connect is not available on Microsoft Edge
   o Children’s Colorado Connect is not available on mobile phones

c. Ensure cookies are enabled and the browser is enabled to run JavaScript
   i. These are usually enabled by default unless they have explicitly been disabled

Connect users who attempt to access the website from a Thin Client may experience difficulties accessing the system. Check with your Information Services if accessing the internet outside of the Thin Client is a possibility on your network, to ensure the best user experience.
3. **EFFECTIVE Autumn 2019**: Be prepared for Dual Authentication
   a. You will need to have one of the following:
      i. An authentication app such as Authy, Duo, or Epic Authenticator
      ii. Ability to receive text messages
      iii. Ability to receive individual email (not a shared email address)
Log In

   a. Using Internet Explorer version 11 is recommended
   b. Frequent users of Connect may find it helpful to save the website as a favorite
2. Enter your user ID and password
3. Click Log In or press the enter key on your keyboard.

**EFFECTIVE Autumn 2019:** You may be directed to a Dual Factor Authentication screen.

Watch this video: [Connect General Overview](#)
Click the icon or the video title to view.

For information about Dual Factor Authentication, download the [Connect Dual Factor Authentication](#) tip sheet.
Click the icon or the document title to open the document
Welcome to Connect (Home Page)

The Connect Home page is where you will find links to important documentation and the latest news from Children’s Hospital Provider Relations. From here, you can select an activity from the toolbar, quick action buttons, event monitor, quick links, or newstiles.

1. Toolbar
2. Quick Buttons
3. Event Monitor
4. Quick Links
5. News tiles
6. Menu/Log Out
# Connect Toolbar

<table>
<thead>
<tr>
<th>To do this</th>
<th>Toolbar section</th>
<th>Toolbar Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access messages and messaging tools</td>
<td>In Basket button</td>
<td><img src="Image" alt="In Basket" /></td>
</tr>
<tr>
<td>Secure your workstation</td>
<td>Menu, then Secure</td>
<td><img src="Image" alt="Secure" /></td>
</tr>
<tr>
<td>Change your password</td>
<td>Menu, then Settings</td>
<td><img src="Image" alt="Settings" /></td>
</tr>
<tr>
<td>Update demographics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reset dual authentication</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Log Out</td>
<td>Log Out button</td>
<td><img src="Image" alt="Log Out" /></td>
</tr>
<tr>
<td>Return to welcome screen</td>
<td>Home button</td>
<td><img src="Image" alt="Home" /></td>
</tr>
<tr>
<td>See upcoming appointments for all my students</td>
<td>Upcoming Appts - My Patients button; or View Appts quick button</td>
<td><img src="Image" alt="Upcoming Appts - My..." /></td>
</tr>
</tbody>
</table>
Find a Patient

School faculty using Connect have limited access to the patient groups assigned. All patients assigned will be listed in the Pt List activity. Contact your School Health Connect program administrator to have patients added or removed from your patient group.

Click the Pt List or Patient toolbar button, Select Patient or Open Chart Review quick button on the home page, or Select Patient from a Notifications In Basket message

By default, the My Patients tab displays all patients associated with the school(s) listed in Children’s Colorado Connect.
If a patient is not showing on your My Patients tab, and you are sure the signed HIPAA consent was sent to CHCO School Nurse Access, please contact the CHCO School Nurse Access and ask for access to the patient's chart to be granted.

**Patient, Select Patient, Open Chart Review**

These buttons essentially work the same as each other. When you click one of these buttons, you are taken to the Patient List activity. **Additionally, with the Patient button, you can select a chart review activity to jump directly into (e.g. Order Entry, Chart Review, etc)**

**Chart Messages**

Sometimes advisories or important messages may automatically display. To continue, click **OK, Open Record**, or navigate to another activity such as **Chart Review**.
Clinical Review (Patient Chart)

Once you have selected your patient, the patient’s SnapShot page opens, and defaults to the LPOC report. Navigation buttons are lined across the top of the screen, and more activities are hidden under the three dots on the right of the screen.

1. **Storyboard (patient information)**
2. **Chart Activities**
3. **Current Activity/Pushpin**
4. **Reports**
5. **Report Details**
6. **Social Determinants of Health**
7. **Access end date**
8. **Quick Buttons**

Patient information displays in a column along the left side of the screen. You can **Hover To Discover** additional details about the patient. For example, this patient has an Active Treatment Plan you can hover over to see details.
If your monitor is a smaller size, such as a laptop, the Storyboard may appear along the top of the screen.

Patient information displays in a column along the left side of the screen. You can Hover To Discover additional details about the patient. For example, this patient has an Active Treatment Plan you can hover over to see details.
Hovering over the three dots … will display the Chart Navigation Menu.

<table>
<thead>
<tr>
<th>Menu Activity</th>
<th>Purpose</th>
<th>Tips</th>
</tr>
</thead>
</table>
| **Clinical Review** | Review patient clinical information, problem list, encounters with CHCO, labs, imaging, lab results, flowsheet data, allergies, medications, history, and growth charts. | *Longitudinal Plan of Care, Adaptive Care Plan, and Medication reports are available on the SnapShot page.*  
*Chart Review is where you will find medical record documentation.* |

- **Clinical Review**: SnapShot, Chart Review, Care Everywhere, Results Review, Flowsheets, Allergies, Problem List, Medications, Social History, Histories, Face Sheet, Growth Charts
<table>
<thead>
<tr>
<th>Menu Activity</th>
<th>Purpose</th>
<th>Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Care Management</td>
<td>Review the patient’s care gaps; review the patient’s care plan</td>
<td>The school name will be listed in the patient’s Care Team</td>
</tr>
<tr>
<td>Care Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Care Team</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Care Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Profile</td>
<td>Review patient demographics and important FYI’s about the patient</td>
<td>Patient address, emergency contacts, and PCP information is listed under Demographics.</td>
</tr>
<tr>
<td>Patient Profile</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demographics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scheduling</td>
<td>See your patients’ scheduled appointments at CHCO.</td>
<td>Upcoming Appointments will display only the future appointments for the selected patient</td>
</tr>
<tr>
<td>Scheduling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upcoming Appointments</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Watch this video: [Connect Patient Chart Overview](#)
Click the icon or the video title to view.

Watch this video: [Connect Patient Chart Details](#)
Click the icon or the video title to view.
SnapShot Reports

The SnapShot activity under Clinical Review has a variety of reports you may find helpful. Click the buttons along the top of the SnapShot activity to view each report.

<table>
<thead>
<tr>
<th>Report</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>LPOC - Clinical View</td>
<td>Also known as Longitudinal Plan of Care, LPOC, or LCP, this report provides documentation of treatment goals and plans for the medically complex patient, outlining services and treatments across multiple providers and settings.</td>
</tr>
<tr>
<td>OP Meds and Appts</td>
<td>Provides a list of all the patient’s current medications &amp; upcoming appointments for the next 6 weeks.</td>
</tr>
<tr>
<td>Adaptive Care Plan</td>
<td>If the patient has an Adaptive Care Plan in place, the details of the ACP can be viewed here. Questions about the ACP can be directed to the patient’s PCP.</td>
</tr>
</tbody>
</table>
Chart Review

Click the pushpin on any chart review activity to move the tab to the left.

1. Click chart review for more detailed information
   a. Sort by “When” to view most recent encounter

2. Select the Letters Tab in Chart Review to find Health Care Plans (listed as “Action Plan”) in the Reason column
3. When accessing a protected encounter (e.g. VIP patients, etc), a “Break the Glass” warning will appear. Enter your password and reason for reviewing the encounter to gain access.

![Break the Glass](image)

4. Allergies can be reviewed in the Allergy activity, or by hovering over **Allergies** in the Storyboard.
5. Review the patient’s medications in the Medications activity. Click View Details to see additional details about the medications.

6. The Histories activity displays the most recently documented Past Medical & Surgical History, Social History, and Chronic Problem(s)
7. The **Face Sheet** activity displays demographic information, such as the patient’s name, date of birth, emergency contacts, and PCP.

8. Review growth charts by clicking the **Growth Chart** activity, then selecting the appropriate “Reference Dataset” for the patient, then selecting the desired growth chart (e.g. Weight).
Upload Document

If pertinent medical information needs to be uploaded to the patient’s chart, or a duplicate HIPAA consent form is obtained, these documents can be uploaded via Connect to the patient’s medical record. Drag & drop files to the Storyboard, or use the Upload Document tab.

Only the following document types can be attached: JPG, PDF, TIFF, TIF, GIF
Multiple documents can be attached with a total size up to 10 mb

Search for the desired patient documentation to attach to the referral, then click Open.
Enter a short description of the document in the Description field. Some examples might include:

PCP records, visit dates MM/DD/YYYY - MM/DD/YYYY Labwork final results MM/DD/YYYY

Imaging Report: “ABC” X-ray
MM/DD/YYYY Insurance forms - provider questionnaire

Referral Authorization to “X specialty

If the incorrect document was attached, click the red X to remove the document.

When all required fields have been completed, click Accept
Scheduling

You can quickly see your patients scheduled appointments at Children’s Hospital Colorado. From within a patient’s chart, click the three dots • • •, then select Upcoming Appointments.

This will display upcoming appointments for the next 200 days for the patient.

To see all upcoming appointments for all patients assigned to the practice, click Upcoming Appts - My Patients in the toolbar.
Event Monitor

Watch this video: [Connect Event Monitor](#)
Click the icon or the video title to view.

If any patient who is associated with any provider within your group is admitted to Children's Hospital Colorado, you will receive an in basket notification. You will be notified via in basket for the following events:

- Inpatient events: Admission, Transfer, Discharged
- Emergency Room events: Arrived, Discharged
- L&D and Newborn events: Admission, Discharged
- Referral statuses: Authorized, Denied, Scheduled, Appt Canceled, Appt No Show, Referral Created

If you are associated with multiple schools, you may receive duplicate notifications for the same event.
To opt out of receiving any inpatient or emergency room notifications, go to Menu > Event Settings and uncheck the Events I Will Receive option. To opt back in to receiving notifications, check this option and you will begin receiving notifications immediately.

To change Event Monitor preferences, click wrench, or click Menu > Settings in the menu bar, then Event Settings.

To view details of events, hover over an event type, then select a patient. Alternatively, click In Basket from the menu bar and review the notifications in the folders.
You will be directed to the in basket notification, where you can review the patient’s chart. Click Select Patient to open the selected patient’s full chart.

To receive a generic email notification of new events, you must ensure your email address is correct in Connect. Click Menu > Settings, then click User Demographics to update your email address. Ensure Receive e-mail notifications is set to Yes. Click Save to save any changes.

Adding, changing, or updating your email address in Connect will NOT update the email address Provider Relations has on file. You must contact your Provider Relations representative to update the email on file with CHCO & Provider Relations. Updating your email address (or any other demographic information) within the Connect site will ONLY affect where message notifications are sent from Connect.

When you no longer want to see a patient’s notification in the Event Monitor on the Connect home page, open In Basket, select the message(s) (ï), then click Done. This will delete the notification from the In Basket, and subsequently remove the notification from the Event Monitor.
In Basket (Messaging)

Watch this video: Connect In Basket Overview
Click the icon or the video title to view.

In addition to the Event Monitor, other messaging features are available with In Basket:

- Request a new patient chart
- Upload supporting referral documents
- Read important broadcasted messages

Postpone Messages

If no messages are present in any given folder, the folder will not be displayed in the In Basket navigator pane along the left side of the screen.

Use the Properties option to postpone the message to a future date (reappears in your in basket), add a flag (e.g. Write Letter, Personal Reminder, etc), or enter a private remark (does not file to patient’s chart). Postponed messages will be hidden from your view until the postpone date.

Out of Contact

If you will be out of the office for an extended period, or if you anticipate not being able to check your Connect in basket messages regularly, use the OOC (Out of Contact) option to set up an automatic message to be sent to others who send you a message.

Click OOC, then click New. Select a reason (e.g. Out, Unavailable, Other), then enter a comment to send to in basket message senders (e.g. “I’ll be out of the office until X. Please call our front desk for immediate assistance.”). Enter a beginning and end date to send the OOC message. If you want another Connect provider within your practice to take over your in basket, enter their name in the “Delegates:” field. Click Accept.
Read Broadcast Messages

Broadcast Messages are important messages or items of interest sent from CHCO’s Provider Relations department to Connect users, that are ‘broadcast’ to a group of users.

1. When you log into Connect, if a Broadcast Message is available for you to read, you will receive a pop-up window with the Message Subject displayed.

2. To view the message
   - Click the Subject hyperlink
   - To delete the message from in basket, click Done
   - To keep the message in the In Basket and to receive a reminder next time you log in, click next to Done, then select Mark as Unread

   - To view the entire contents of the In Basket, click Go To Messages
   - To hide the notification an receive a reminder next time you log in to Connect, click Remind Me Later
Logging Out or Securing your Screen

There are two ways to properly leave your session: Secure or Log Out.

Secure your screen

Click the Secure button in the toolbar to secure your screen. Your session will end after 10 minutes, logging you out.

To log back in, enter your password and click Resume.

Log Out

Click the Log Out button in the toolbar.

You must log out from the Connect site. Closing the internet browser does not log you out and may result in locking your access to Connect. In most cases, a message will display containing a link to “log out.”
Need Assistance?

Email: ConnectQuestions@childrenscolorado.org or SchoolNurseAccess@childrenscolorado.org

IT Help Desk at Children's Hospital Colorado: (720) 777-HELP (4357) or toll free (800) 525-4871.

Passwords must have a minimum of eight characters, a number or symbol and at least one capital letter. Passwords will automatically expire after six months. A member of the IT help desk can reset a forgotten password over the phone by calling the above number.
# Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadcast Message</td>
<td>An important message sent to a select group of Connect users, or to all Connect users</td>
</tr>
<tr>
<td>Clinicals</td>
<td>A toolbar activity button directing the user to the patient’s chart</td>
</tr>
<tr>
<td>Connect</td>
<td>Children’s Hospital Colorado’s web application that allows affiliate organizations to view a patient’s clinical data, health care plans, and letters.</td>
</tr>
<tr>
<td>Children’s Colorado Connect CCC</td>
<td></td>
</tr>
<tr>
<td>Event Monitor</td>
<td>A pane displayed in the Connect Home Page displaying events for their patients including inpatient admissions &amp; discharges and emergency room admissions, discharges, and dismissals</td>
</tr>
<tr>
<td>In Basket</td>
<td>Messaging system integrated into Connect &amp; CHCO Epic</td>
</tr>
<tr>
<td>Newstiles</td>
<td>A section on the Connect Home Page listing important topics of interest, upcoming CHCO events, and links to documents geared to clinical practitioners</td>
</tr>
<tr>
<td>OOC</td>
<td>Out of Contact – an automatic message sent to other Connect users when the message recipient is not available to review In Basket messages</td>
</tr>
<tr>
<td>Quick Links</td>
<td>A section on the Connect Home Page listing useful external links and helpful CHCO published documents available to community providers</td>
</tr>
<tr>
<td>Thin Client</td>
<td>A lightweight, fan less computer with no hard drive, used for accessing applications and data through a network or cloud server</td>
</tr>
<tr>
<td>WLDA</td>
<td>Wounds, Lines, Drains &amp; Airways</td>
</tr>
</tbody>
</table>