SOUTH CAROLINA VETERAN COALITION

Partner Portal Manual

A SOUTH CAROLINA DEPARTMENT OF VETERANS'
AFFAIRS INITIATIVE- POWERED BY COMBINED ARMS

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The login portal can be accessed through the South Carolina Department of Veterans Affairs website under the South Carolina Veteran Coalition tab. There you will see the screen pictured above. At the top of this page, clinical partners will utilize the **Member Organization Login** button, circled in the above image.

Upon clicking the Member Organization Login Button, you will be redirected to a new browser page, pictured to the left. This screen should display Combined Arms' logo at the top, with a prompt to enter your username and password.

Enter your username and password at this time.

Note:
- Your username is your email.
- Should you forget your password click the "Forgot Your Password" prompt located at the bottom of the screen. Upon clicking this link, you will be prompted to enter your email address. An automated email from the Combined Arms system will appear in your inbox prompting you to reset your password.
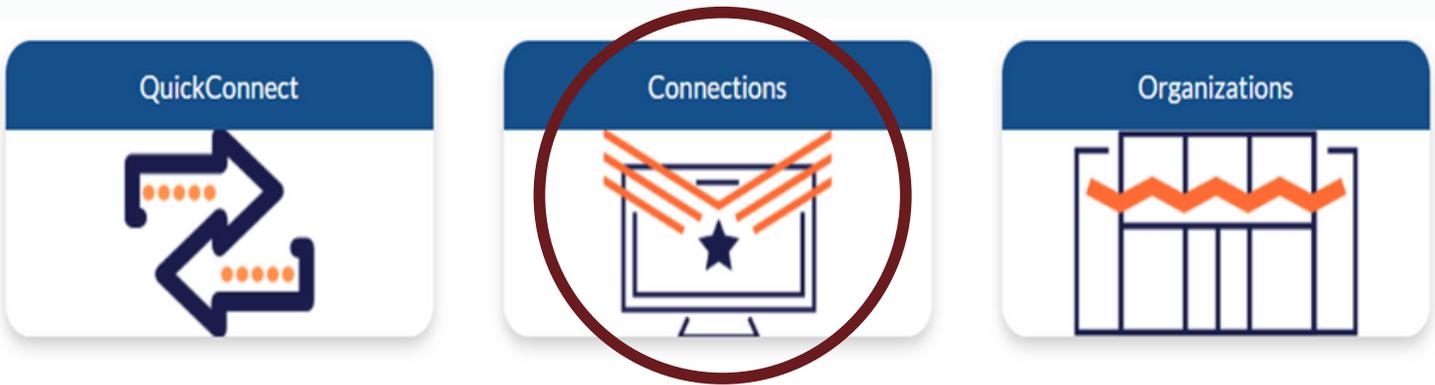
After successfully logging in, you will be directed to the "Partner Portal". Three buttons (pictured above) will be displayed at the top of your screen. Click the "Connections" (circled in the image above). From here, the following screen will be displayed.

The Connections page will allow you to view available referrals to process. The workflow diagram (above) shows the progress of your assigned cases. Cases begin under the column "Connection Initiated." As the client moves through the process, their case number will proceed from left to right in the diagram. Selecting a connection number from the workflow diagram will direct you to the client page.

- Connection Initiated – A new client has requested to connect to your organization, but they have not yet been contacted by your agency.
- Connection In-Progress – You have made first contact with the client through the Combined Arms system.
- Connection Established – Used for clients that need more than one session to fulfill their request for your service.
- Closed – You have successfully fulfilled the client's request for your service, or you have returned the client to VWA for further assistance.

Making a Connection

The top of the client page contains several items. Directly below the client's name (top left below the heading "Connection" and next to the yellow icon) you will find the Connection Number, Service, Status, and Date/Time Opened.

A. Connection Number – This is marked by a yellow icon with a briefcase identifying number assigned to each case.

B. Service – Identifies the referring service.

C. Status – Connection status progress.

D. Data/Time Opened – The timestamp indicates when the case was opened. The connected veteran will need to be contacted within 3 business days (72 hours) of the date and time on the page

This section provides options related to the connection process, "Send Message To Client" and "Referral Status" (circled above). Sending a message to the client is not mandatory if the preferred contact method is by email.

However, completing the referral status tab is mandatory to stop the timer on your response time. ***If you do not complete the referral status step, an email notification will be triggered and sent to the Care Coordinator 72 hours after the case was referred to you.***

If the referral status is never moved to "In Progress" and saved, the status timer will continue to run showing that the Veteran has not been contacted. This indicates that the assigned case has not been processed in the allotted timeframe. The Care Coordinator will then follow up with you to resolve any issues.

The "Sent Message To Client" tab is not mandatory.
Use this feature if the preferred contact method for a Veteran is email:

1. Initiate contact with the Veteran by sending a message using the Combined Arms
   Connection Portal.
2. Add your message to the "Body" of the text box
3. Click "Save."
4. The "Send Customer Notification" and "Public" boxes can remain checked.

This will automatically move the case status to "In Progress," stopping the 72 hour timer.
Once your message is sent, it will appear as a communication record on the right-hand side.

If the preferred contact method for a Veteran is by phone:

1. Initiate contact by placing a phone call to the Veteran.
2. Once you have reached out to the Veteran via phone, update the "Referral Status" to "In
   Progress" and select "Save."
3. Once you have received communication from the Veteran, update the case status to
   "Connection Established."

Referral Status Key:

- Status – Here you can move your case to any of the four phases of the Connection Management Cycle.
    - a. Connection Initiated: You have received a connection via Connection from the Care Coordinator.
    - b. Connection in Progress: You have reached out to the Veteran and are waiting to hear back from them.
    - c. Connection Established: The Veteran and your clinic are in communication, but the Veteran has not been connected your program.
    - d. Closed:
        - i. You have connected the Veteran to your program.
        - ii. You have made 3 contact attempts but were unable to reach the Veteran.
        - iii. You have been able to connect with the Veteran but not being able to connect them to your care.
- Closed Connection Status – Located underneath the status dropdown, here there are nine reasons available for you to choose from when closing a connection.
1. Successfully connected with client.
2. Client never replied to our communications.
3. We referred to another org.
4. Unable to help client, unrealistic expectations.
5. Unable to help client, referral was inaccurate.
6. We have already worked with this client.
7. Organization never responded to client – CAX took over.
8. CAX Closed the connection.
9. Any other reason.

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Send Message To ...	**Referral Status**	TVC Connector	Veterans Wellnes...

*Status

Closed ▼

Contact Name

[🪪]   ×

Closed Connection Status

--None-- ▼

Has the client received the service? ⓘ

--None-- ▼

Outcomes

--None-- ▼

Closed Connection Status Notes

[ ]

Save

Outcomes – The options available from the "Outcomes" drop down field are dependent on the selection of the "Closed Connection Status."

Contact Name – Name of the Veteran being served.

Has the client received the service? – The options available from this drop down field are dependent on the selection from the "Closed Connection Status." Additional details provided in the information icon .

- This is very important. You can select "Yes", "No", or "Cannot Disclose". We need to know whether or not your organization fulfilled the client's request when you closed the case.
- However, some organizations are legally restricted from doing so. In which case, they must select "Cannot Disclose" to meet our satisfaction of knowing the organization did receive the referral from our system as an absolute bare minimum.

Closed Connection Status Notes – Additional notes can be included in this text box. This is entirely optional, but useful to you and other team members that find value in additional information on a client's requests for services from your organization. *Note: Only record information related to contact attempts and be sure to update the "Referral Status," if necessary. **Do NOT include any HIPPA related information.**

5   Referral Status

Classifying Status:
- After you initiate contact with the Veteran, update the "Status" to "Connection In Progress."
- Once you have received communication from the Veteran, update the "Status" to "Connection Established."
- If you do not receive communication from the Veteran, select from the options under "Closed Connection Status" *Note: this drop down will be used to classify any case that needs to be closed.

Reasons to Close a Case:
- After successfully connecting a Veteran to care.
- After connecting with the Veteran, but not being able to connect them to your care/organization.
- After 3 attempts to contact the Veteran have been made, but the Veteran was "non-responsive" to your communication attempts.

As part of the standard operating procedure for contacting Veterans, you are required to attempt to contact the Veteran three (3) times before closing the case due to non-responsiveness. Each case will indicate the Veteran's preferred contact method. Based on that preferred contact method, you should contact the Veteran based on the following method:
1. If the Veteran's preferred contact method is email you will have attempted to contact the Veteran via 2 emails/1 phone call.
2. If the Veteran's preferred contact method is phone you will have attempted to contact the Veteran via 2 phone calls/1 email.
3. The timeline for contact attempts after receiving the referral in Connections:
    - First Attempt: 1-3 business days.
    - Second Attempt: 4-5 business days.
    - Third Attempt: 6-7 business.
-

How To Close A Case:
- Once inside the case, click the "Referral Status" tab
- Update the case status to "Closed"
- Select the appropriate drop-down under "Closed Connection Status"
- Select the appropriate drop-down under "Outcomes"
- Select the appropriate drop-down under "Has client began receiving services?"
- Click "Save"

6 Connection Notes

On the right side of the page, you can review or add notes created by the Care Coordinator for the client. ***Note: Only record information related to contact attempts and be sure to update the "Referral Status," if necessary. Do NOT include any HIPPA related information.**

1.Scrolling below the "Assignment" heading with the green box, "This Case Belong To You," will provide additional information about the case and client.

A. Contact Info – Contact information for the Veteran and a summary of their situation, if available.

B. Connection Summary – Where the connection came from.

C. Case Status – Summarizes the progress of the connection, including status and remaining time to contact the Veteran.

D. Referral Info – More detailed information about the case, origin, and priority

E. Veteran Wellness Alliance – This section contains all the pertinent information collected from the Veteran in order to make a referral, fields can be edited.

F. Close Out Info- Summarizes the close out information of the case.

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E.

Veteran Wellness Alliance

VWA Connection Came In

Reason for connection

Confidentiality
The information that we discuss today will be stored on a secure platform. The only individuals with access to this information will be the clinical partner I am referring you to. The only time any information will be shared with anyone beside a clinical partner is if you are at risk of harming yourself, someone else, or if there is child or elder abuse. Before you we move forward do you have any questions?

Date of Birth

Verbally Acknowledged Confidentiality

Era of Service

VWA Acknowledged Confidentiality

Past or Current mental health treatment

E. Veteran Wellness Alliance – This section contains all the pertinent information collected from the Veteran in order to make a referral, fields can be edited.

F.

Close Out Info

Rating

Date/Time Closed

How did you contact the veterans?
Email

Internal Comments

Web Email

Parent Connection

F. Close Out Info- Summarizes the close out information of the case.

For further assistance using this system please contact the Gabriel Trujillo at the South Carolina Department of Veterans Affairs.
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