Managing Services in CommunityCareNB

SERVICE PROVIDERS

| USER GUIDE |

Version 0.2

Table of Contents

CONFIDENTIAL STATEMENT

Version & Document Control Table

This version control table provides historical data about each update made to a document. It is useful to include the author, date and notes about each change made to refer to what these changes were.

Version Control			
Version	**Edited**	**Date**	**Changes**
0.1	Amy Michaud	04/23/2025	First Draft
0.2	Amy Michaud	04/25/2025	Quick Reference Guide / Appendix / Terminology & Status Table

Welcome to CommunityCareNB

CommunityCareNB is a digital platform for Service Providers to communicate with Social Development (Social Development) about services. We are building CommunityCareNB to make it easier to communicate with Social Development about services and to reduce errors and delays. To begin, CommunityCareNB is being used in South-Western NB and for clients with disabilities. CommunityCare will be expanded to include all Social Development clients and services.

To learn more about CommunityCareNB (what you need, notifications and basic navigation), refer to the Appendix at the end of the guide for more information.

In CommunityCareNB, your organization will receive and respond to requests for services (orders).

CommunityCareNB has additional features that you may not need or use. Your organization may use CommunityCareNB to:

- Communicate with SD about changes to services.
- View Active and historical order information.
- View report information using the Dashboard.

New Terminology & Statuses

New Terminology / Order Statuses	Also Known As / Definition
Activated Status	This status means that the service has been accepted by the service provider, meaning they can now begin offering services to the client.
Canceled Status	This order summary has been canceled. If an order is cancelled, it is as though it was never offered. This means that you cannot bill for this service.
Offered Status	This status means that Social Development has requested services, and the order requires the service provider to review and accept or decline.
Pending Status	This status means that a worker at Social Development is adjusting a client's service.
Terminated Status	This status means that the services have ended. Logging a request can still made for direct communication with the SD Worker and the service provider is still able to invoice for services rendered.
Order	Individual Service Request / Service Requisition all found under the Order Summary. This can include modifications and amendments made by SD.
Order Summary	A summary of service request / requisition, including all changes or amendments made the original service.
Service Report	Overall term used for when a service provider must notify the SD Worker of an Incident or Observed change in the client, requests a change to services or logs a miscellaneous request.

Quick Reference Guide (Step-by-Step)

For more information and a detailed step-by-step with pictures, click the title (blue-underlined text) to be brought the location in the document.

Log in:

1. Go to https://ccnb-scnb.gnb.ca/partnerportal/s/
2. Log in using your username and password.

Review Offered Services: *note, some services do not require review or acceptance (e.g., transportation)

1. Select **Service Requests** tile on homepage.
2. Select the **Offered** tab.
3. Select the **Order Number** hyperlink (blue text).
4. The Offered service is displayed.

Accept or Decline Offered Service:

1. Open the **Offered Order.**
2. Under the **Order Summary Modified Status** select **Accept** or **Decline**.
3. Click **Next**.
4. Select **Accept Request** or **Decline Request**.
5. Order status is now Activated if accepted. Declined orders will disappear and the homepage is displayed.

View Activated & Pending Services:

1. Select **Service Requests** tile on homepage.
2. Select **Active** tab – this displays both Activated and Pending orders.
3. Locate and click the **Order Number** hyperlink (blue text).

Search for Client:

1. Select **Service Requests** tile on homepage.
2. Select **Search** tab.
3. Enter the client's name or Order Number and click **Search**. Before conducting another search, ensure to click the **Clear Fields** button.
4. If searching by Account Name, the list will display all related clients with a similar name, as well as all related orders, unless the search is refined and specific.

Requesting Changes to Services:

1. Locate and open the applicable **Activated** Order.
2. Select the **Log a Change Request** button.
3. All mandatory fields are indicated by a red Asterix (*).
4. Select the **Category** from the dropdown menu.
    a. The available types will appear relating to the chosen category.
5. In the **Type** field, select the **Available Change Request Type**. Once selected, move it to **Chosen** by clicking the **forward arrow** (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available option will be moved over to **Chosen.**
6. Provide a description of the change in detail and the reason for the change request.
7. A Confirmation pop up message will appear. Select the **Finish** pushbutton to complete and close.

Miscellaneous Request (Cancelled & Terminated)

1. Open the Cancelled or Terminated Order.
2. Click the **Log a Request** button.
3. Capture the request description relating to the cancelled or terminated order and press **submit**.
4. A confirmation message is displayed.
5. Click **Finish**.

View Service Report from Order Summary:

1. Navigate to and open the applicable client Order Summary (re: View Offered Orders)
2. Once on the Order Summary, scroll down and locate the **Service Reports** field.
3. Click the applicable **Service Report Number** hyperlink. To view more, select "view all".

View Reports from Dashboard:

1. From the **Service Delivery Dashboard**, locate the applicable report type to view. The **View Report** hyperlink can be found at the bottom of any of the individual fields.
2. Once in the applicable **Report** window, a full list of related report items is displayed.
3. To return to the Service Request dashboard, click the **Go Back** arrow on the browser.

Refresh Data on Dashboard:

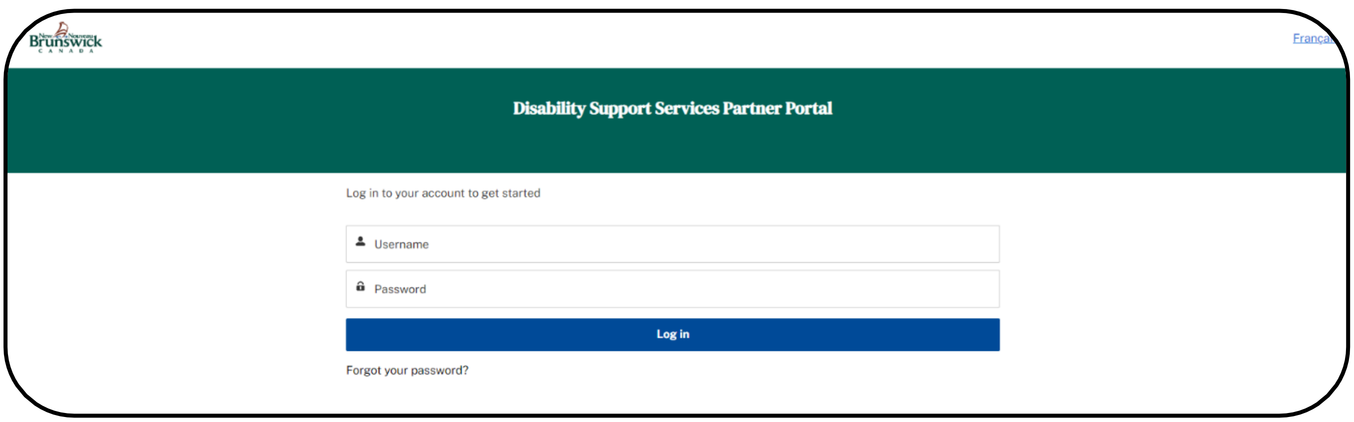
Click the **Refresh** button from at the top right of the dashboard window.

Log In

Because CommunityCareNB has personal information, we have a responsibility to protect people's private information. In addition to unique username and password, CommunityCareNB uses a second layer of security, multifactor authentication, to ensure the people logging into the system have authorized access.

IMPORTANT: Salesforce will have sent an email asking you to verify your credentials (email) and to set up a password. Do this before completing the following steps.

3. Go to https://ccnb-scnb.gnb.ca/partnerportal/s/
4. Copy the above link in your browser's search bar. Click the **Star** icon to favourite/bookmark the link for quick and easy access.
5. Log in using your username and password.



Homepage

The homepage is where you will land every time you log into CommunityCareNB. This is how you will get around the system to view client information and reports.

1. **Service Requests:** In this section you will find the Order Summaries (a.k.a orders; service requests; service requisitions) that have been offered to you by Social Development, as well as the current and past services offered by you. This area of the portal is where you will review, accept, or decline services as well as communicate directly with Social Development and the client's Worker.

2. **Service Reports:** Selecting this tile will open the Service Report history window. From here, you can view all change or miscellaneous requests that you sent to Social Development.

3. **Service Request Dashboard:** The **Dashboard** displays reports related to new (last 30 days), expiring (next 30 days), as well as all activated and terminated order summaries. Reports can be viewed and exported.

Receiving a Request for Services

Services are now referred to as **Order Summary** when describing an order/service request/requisition. These order summaries are what service providers receive from Social Development. The change to Order Summary was made because if any changes are made to a service, rather than being a separate "order", they can be found within the order summary, making it easier to keep track of changes. For example: anytime you communicate (request a change, accept an order, etc.) to SD, the information goes directly to the client's worker. You do not need to worry about remembering ID numbers or figuring out who to send information to. The order summary contains the information needed by the service provider to deliver service.

Receiving and responding to a new order:

You will receive requests for services from Social Development within CommunityCareNB. We understand you may not use CommunityCareNB every day however, the common process for reviewing and responding to requests is:

Step 1: you will receive an email to notify you there is a new order for you to review in CommunityCareNB. This email will come from either ccnb-scnb@gnb.ca or noreply@salesforce.com, and will have a direct link that takes you to login to the system and view the new order information.

Step 2: Log in and review the order summary.

Step 3: Accept or decline the request for services.

Order Summary (Reviewing and Accepting/Declining a Request for Services)

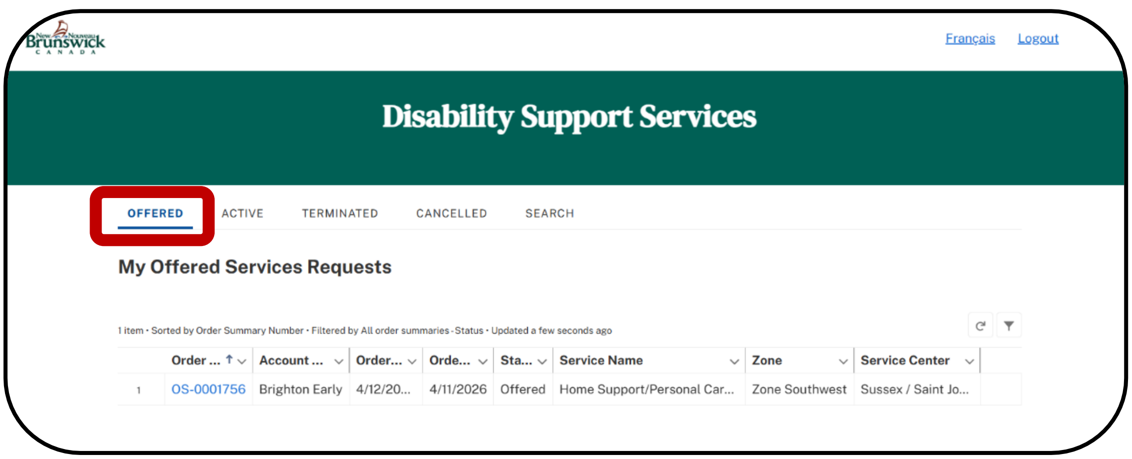
When Social Development sends an order to a service provider, it will come as activated or offered. When it is offered, the service provider needs to review and accept the order.

Please note: ONLY orders in the 'activated' list are approved to deliver the service.

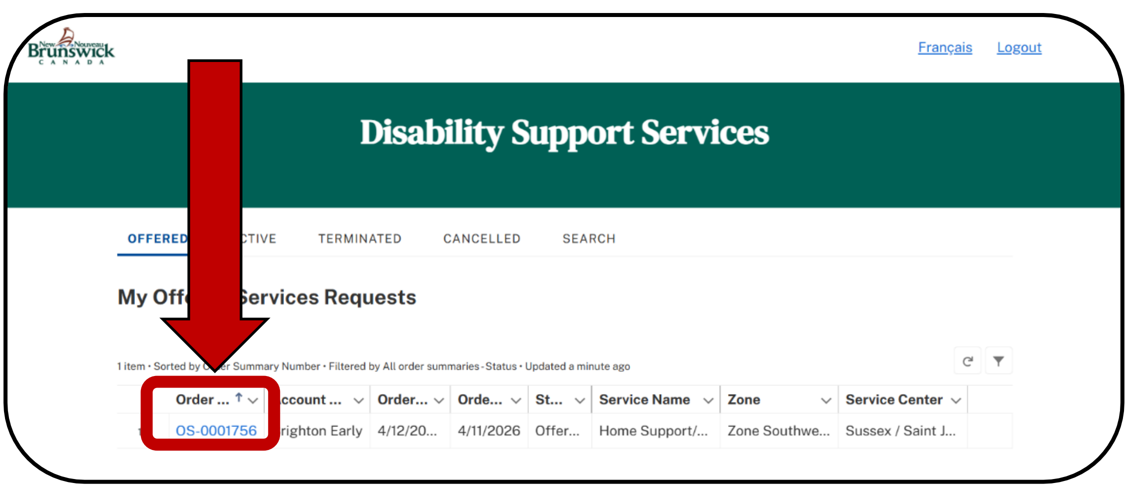
Review Offered Services

To locate and view an offered service, follow the steps below:

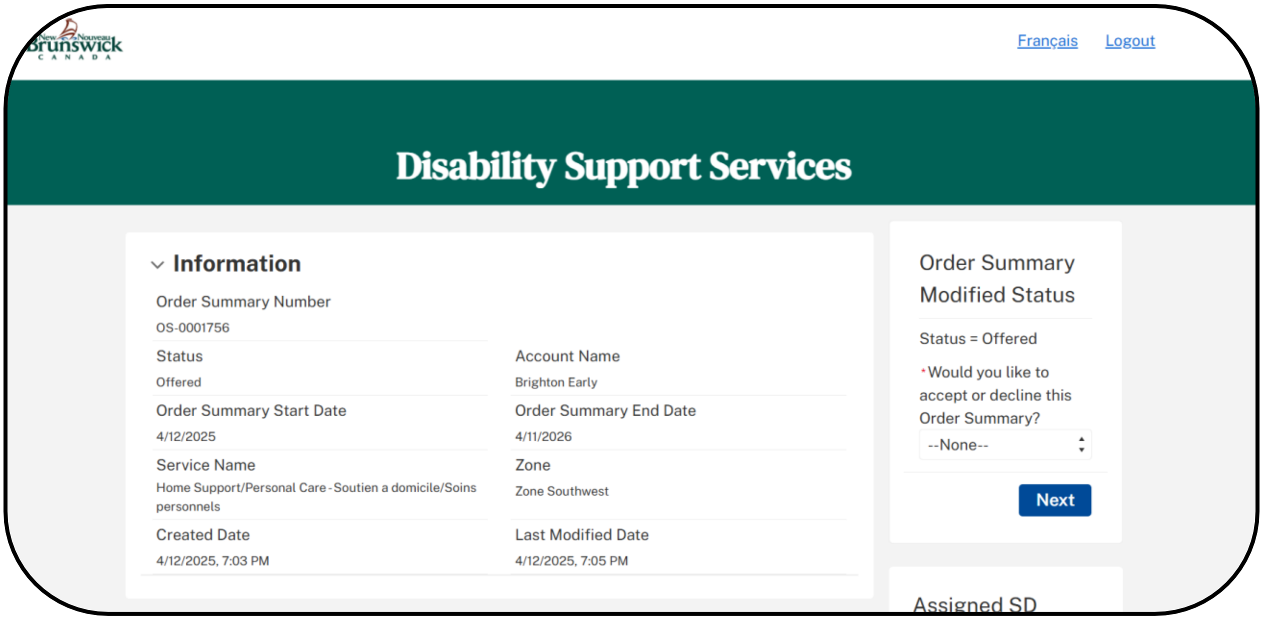
1. From the homepage, select the **Service Requests** tile**.** The **Offered** tab is automatically displayed. You will see a list of all offered orders with some basic information.



2. Select the **Order Number Hyperlink** (blue text) to view order information.



3. You can now see the information you need to either **accept** or **decline** the order.



NOTE: If you need to contact a client's worker, open the service request and the Assigned SD Worker will always be current.

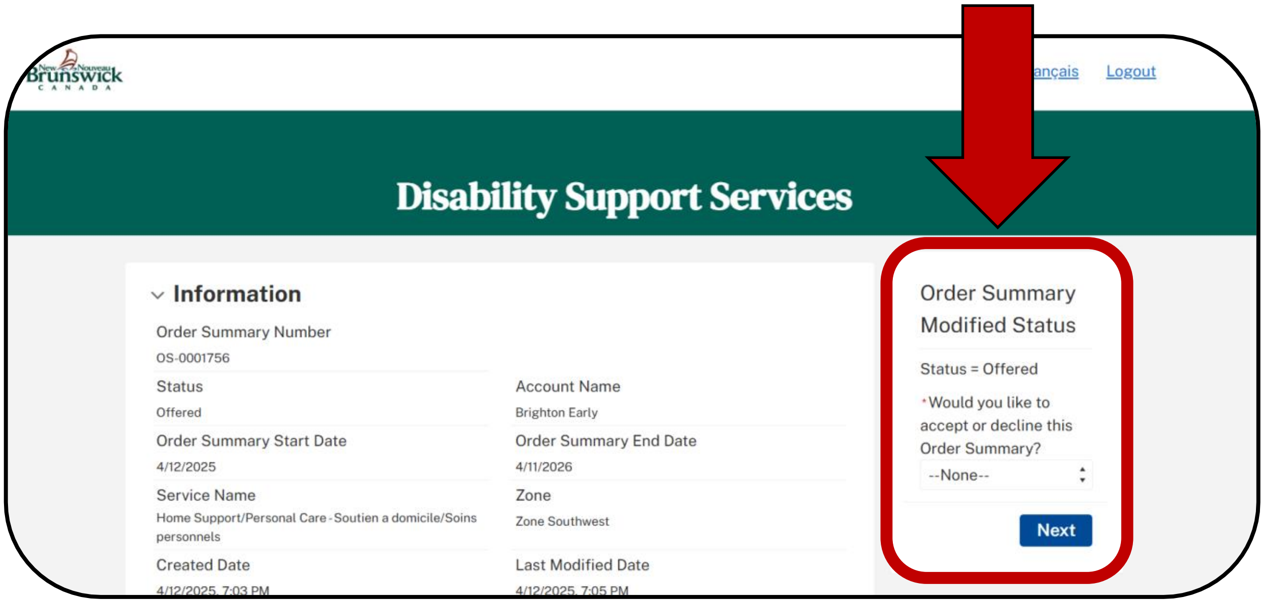
IMPORTANT: Some services will not need to be accepted and will arrive in the 'active' tab. The following services are automatically activated once Social Development has offered it to the relevant service provider:

Accept or Decline Offered Services

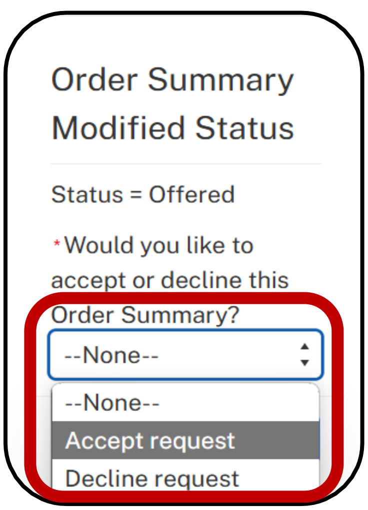
If you received an order as 'offered' you will need to:

a) Select Accept if able to provide the services, or
b) Select decline if unable to accommodate the request. In either case, you can add a comment.

1. Locate and open an **Offered Order** found under the pending tab.
2. Once opened and reviewed, locate the **Order Summary Modified Status** field.



3. Select the dropdown menu with **"- -None- -"** displayed.
4. Select **"Accept request"** or **"Decline Request"**.

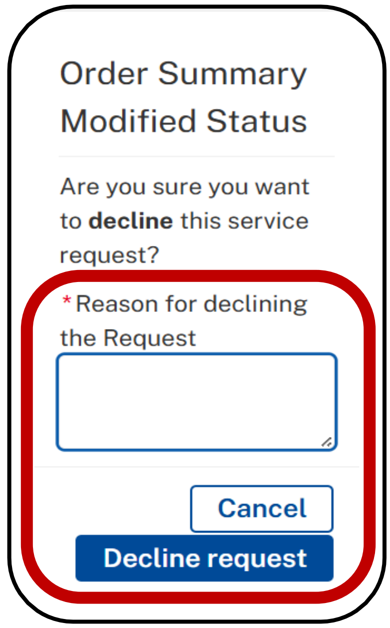


5. Click the **Next** pushbutton.

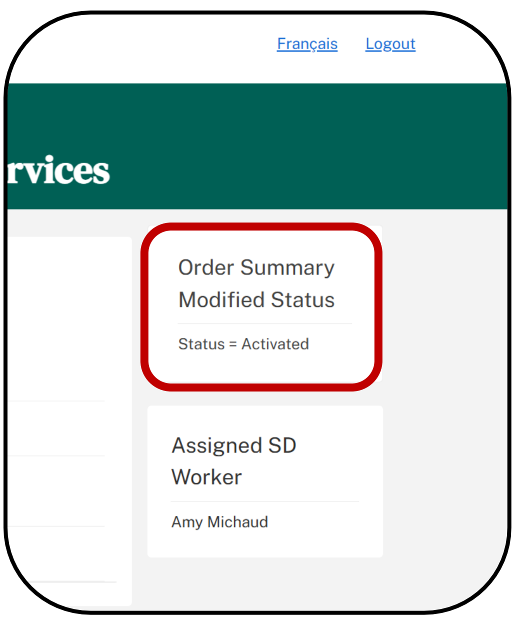
6. A verification question will appear in the **Order Summary Modified Status** field.

   ***Optional:** include a message for Social Development.*

OR



7. The **Order Status** is updated to from Offered to **Activated**. If declined, the system will reload and display the homepage.



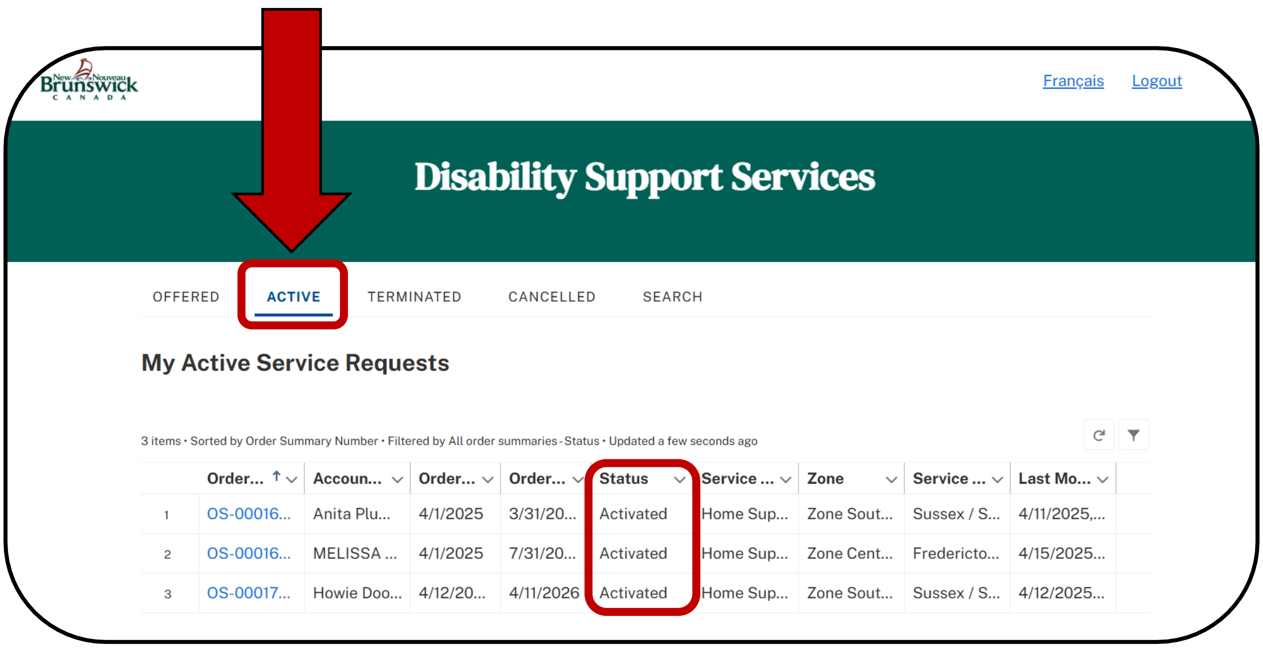
Activated & Pending Services

Once a services Order Summary has been accepted, it will now automatically be Active. An activated order let you log service reports (i.e., request changes be made to the service) and confirm services with the Department. The status will change to Pending if an SD Worker is making changes to the Activated order - while in pending, service providers are unable to submit service confirmations.

Navigating & Viewing

1. From the homepage, select the **Service Requests** tile.

2. Once the window is displayed, select the **Active** tab. The Active tab displays **BOTH** Active and Pending orders.



3. Select the applicable Order Number to view additional information and log service reports.

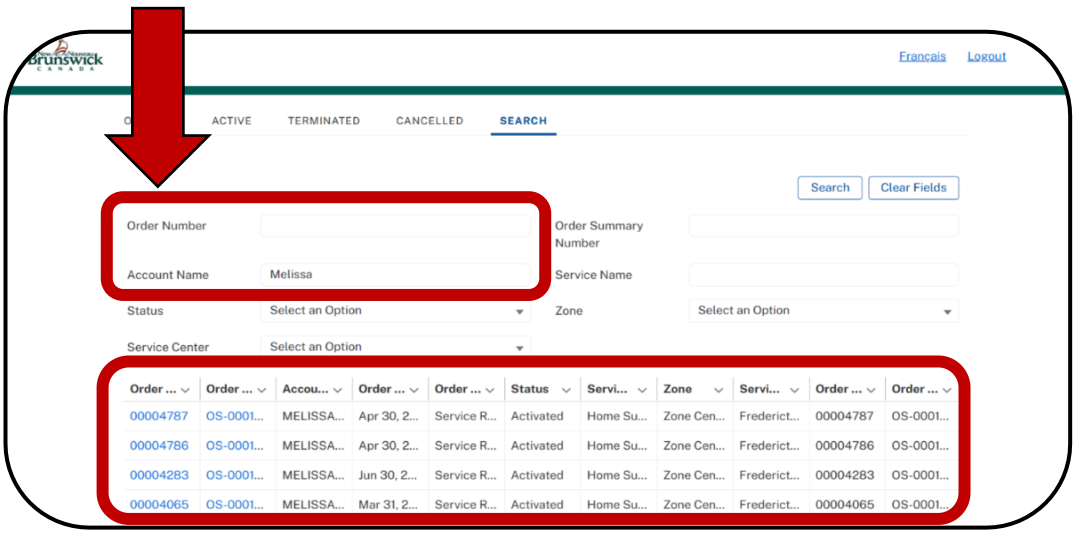
IMPORTANT: PENDING orders are also displayed on the **Active** window. Pending is only displayed when someone in Social Development is making updates to the order. It will automatically reactivated once the changes are finalized at Social Development.

Search for Clients

The **Search** tab found under **Service Requests** (Homepage) gives you the ability to search for clients by their name, Order Number, or Order Summary number. Additionally, you can refine the searches by selecting the zone, status, and service center. Not all fields need to be completed to conduct a search.

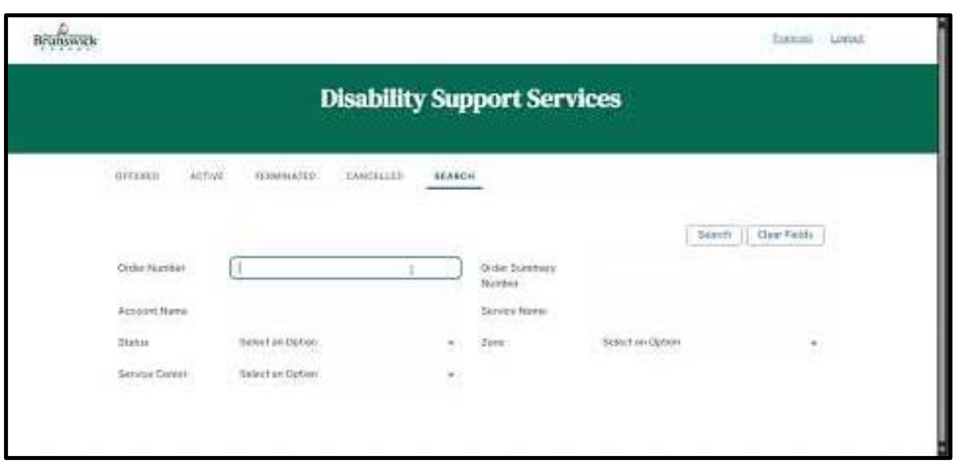
1. Open the **Search** tab under the **Service Request** (*Homepage*).

2. Enter the client's name or Order Number and click **Search**. Before conducting another search, ensure to click the **Clear Fields** button.



3. If searching by Account Name, the list will display all related clients with a similar name, as well as all related orders, unless the search is refined and specific.

CLICK ON THE PLAY BUTTON TO BEGIN THE VIDEO DEMONSTRATION



Service Reports

Once an Order is Activated, you will have the ability to log service reports (i.e., incident, observable changes, changes to services). This allows for direct communication with the primary SD Worker notifying them that changes are required in relation to a specific service order. Additionally, Once an Order has been Cancelled or Terminated, changes to the request can no longer be made however, you do have the ability to log a Miscellaneous Request through the **Log a Request** button.

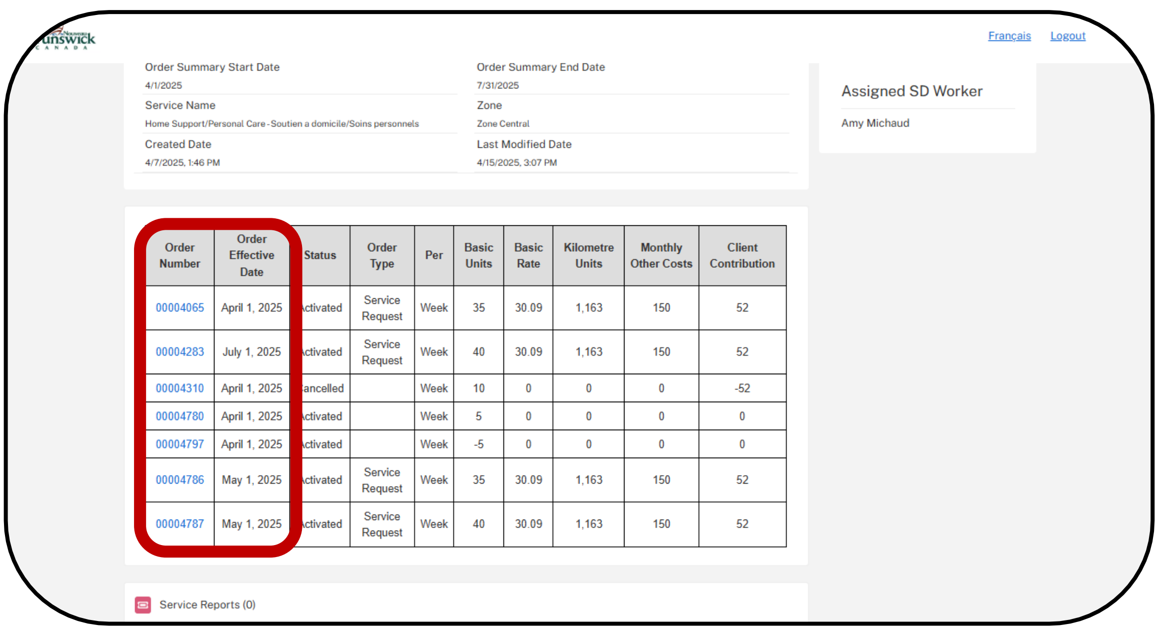
IMPORTANT: When requesting changes to the service, ensure to select the order and its related month.

Logging Service Reports (Incident, Observable, Request Change)

The process for logging service reports, whether an incident, observed change in the client, or adjustments need to be made to an order (*service request*), the processes are the same. Not all services will have access to the Incident and Observable Changes however, the process to access and to log a service report remain the same. Any fields with a **red Asterix** (*) are mandatory and you must complete them before being able to click submit.

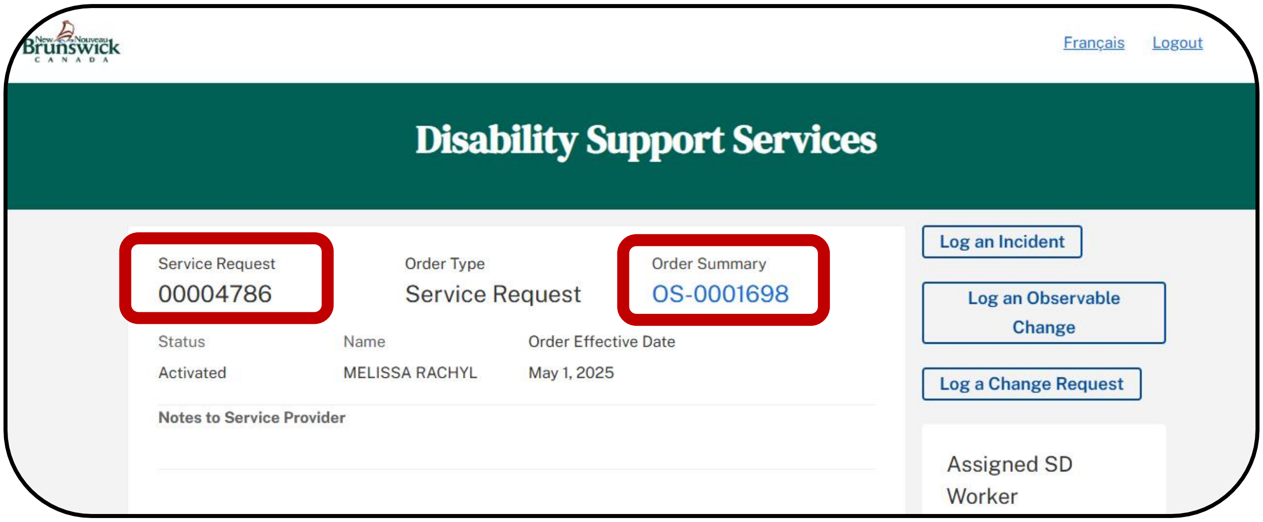
1. Locate and open the applicable Order Summary.

2. Once on the Order Summary, scroll down to the **Order Table** and locate the applicable Order Number but referencing the **Effective Date** column.

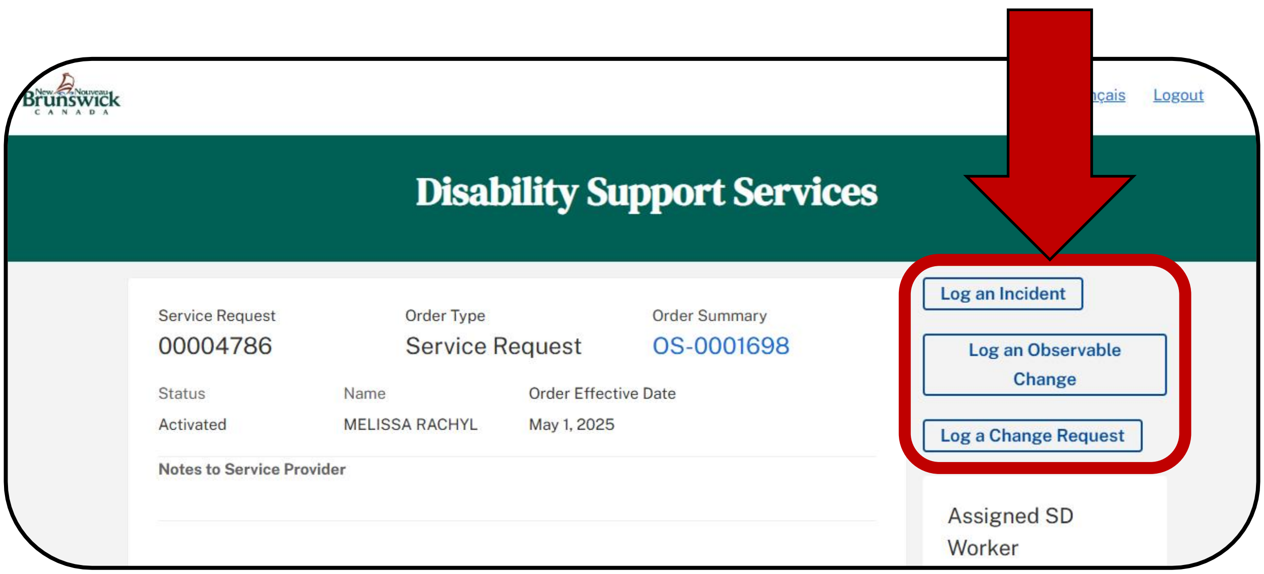


Order Number	Order Effective Date	Status	Order Type	Per	Basic Units	Basic Rate	Kilometre Units	Monthly Other Costs	Client Contribution
00004065	April 1, 2025	ctivated	Service Request	Week	35	30.09	1,163	150	52
00004283	July 1, 2025	ctivated	Service Request	Week	40	30.09	1,163	150	52
00004310	April 1, 2025	ancelled		Week	10	0	0	0	-52
00004780	April 1, 2025	ctivated		Week	5	0	0	0	0
00004797	April 1, 2025	ctivated		Week	-5	0	0	0	0
00004786	May 1, 2025	ctivated	Service Request	Week	35	30.09	1,163	150	52
00004787	May 1, 2025	ctivated	Service Request	Week	40	30.09	1,163	150	52

3. The Order is displayed with a link to return to the Order Summary (blue text).

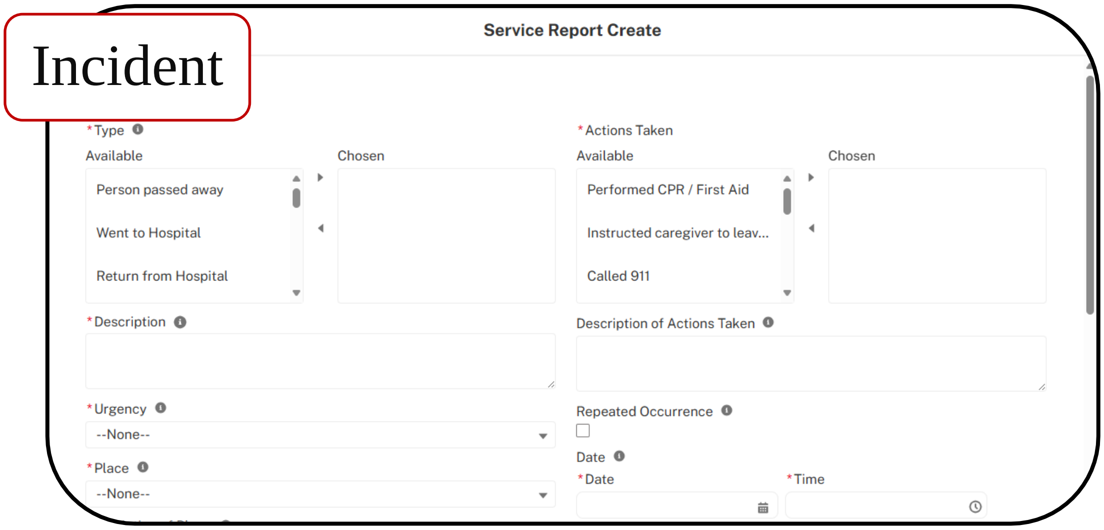


4. Select the service report type button to be logged.

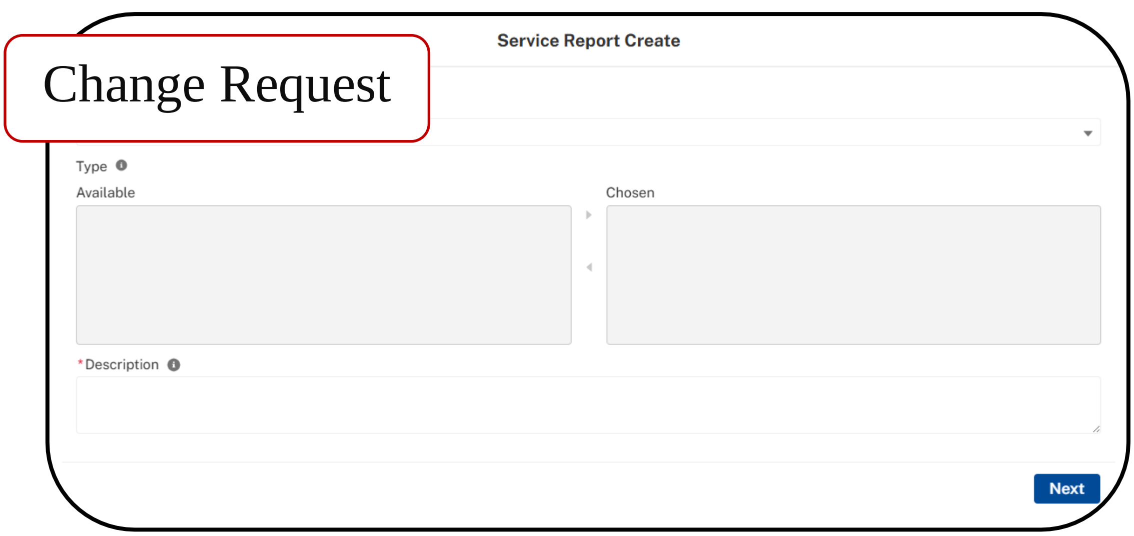


5. Depending on the selected service type, you will see the following pop-up windows. Each screenshot is of a different service report window and are labeled in the top left corner. When logging a change request, different information will be displayed depending on the selected type.

   REMINDER: Not all services will have access to incident and observable changes. Additionally, mandatory information is indicated by a red Asterix (*).

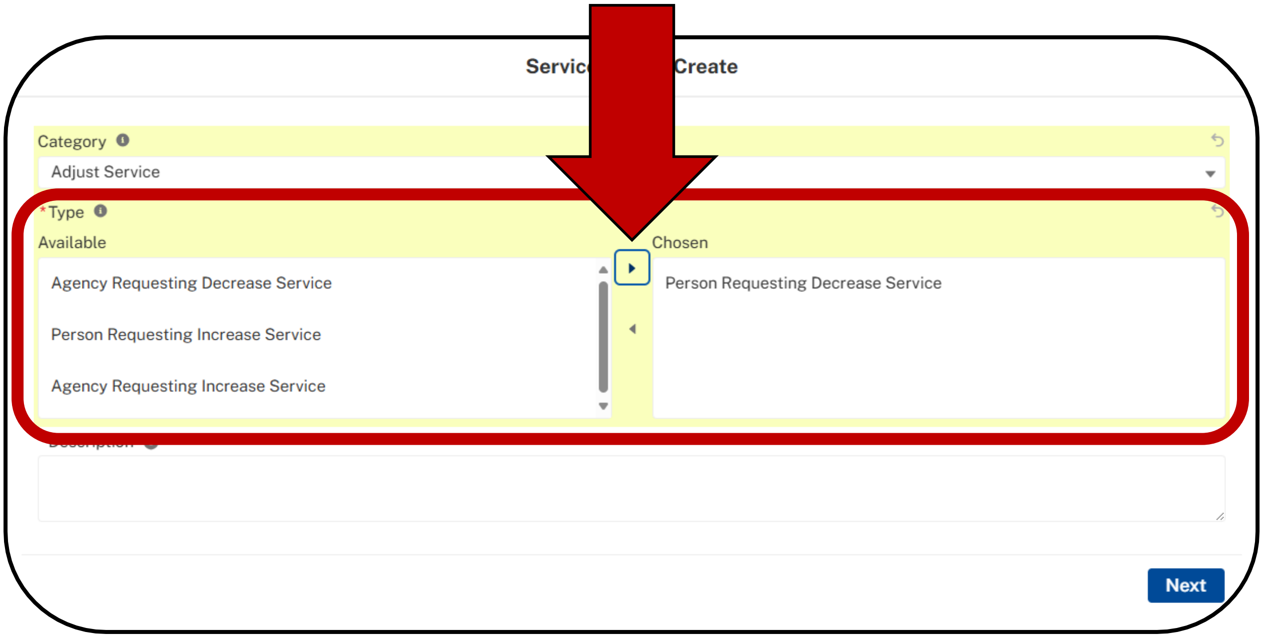

Incident
Service Report Create
*Type
Available
Chosen
Person passed away
Went to Hospital
Return from Hospital
*Actions Taken
Available
Chosen
Performed CPR / First Aid
Instructed caregiver to leav...
Called 911
*Description
Description of Actions Taken
*Urgency
--None--
Repeated Occurrence
Date
*Date
*Time
*Place
--None--


Observations
Service Report Create
Available
Chosen
Change in Mobility
Change in Cognitive
Mental Health
*Description
*Place
--None--
Description of Place
Description of Actions Taken
Repeated Occurrence
Date
*Date
*Time
Follow-up Required


Change Request
Service Report Create
Type
Available
Chosen
*Description
Next

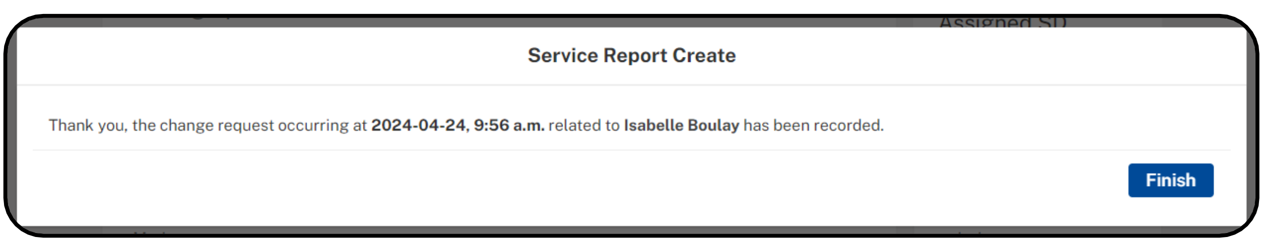
6. Enter in and select the report/request information.

7. When an **Available and Chosen** function is presented, you will to select the from the Available list and click the **forward arrow** (▶) located between the Available and Chosen list boxes. Once clicked, the selected Available option will be moved over to **Chosen.**



8. Review the information you captured and then click the **Next** button.

9. You service report has been submitted to Social Development for review and/or action. Click **Finish** to exit the pop-up.

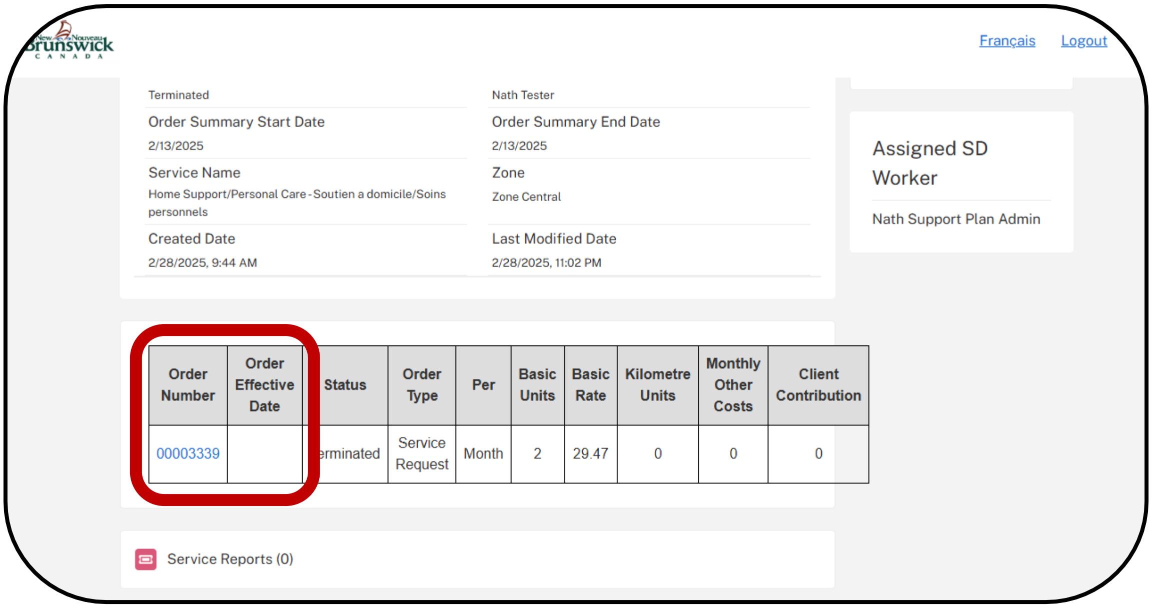


Miscellaneous Request (Cancelled & Terminated)

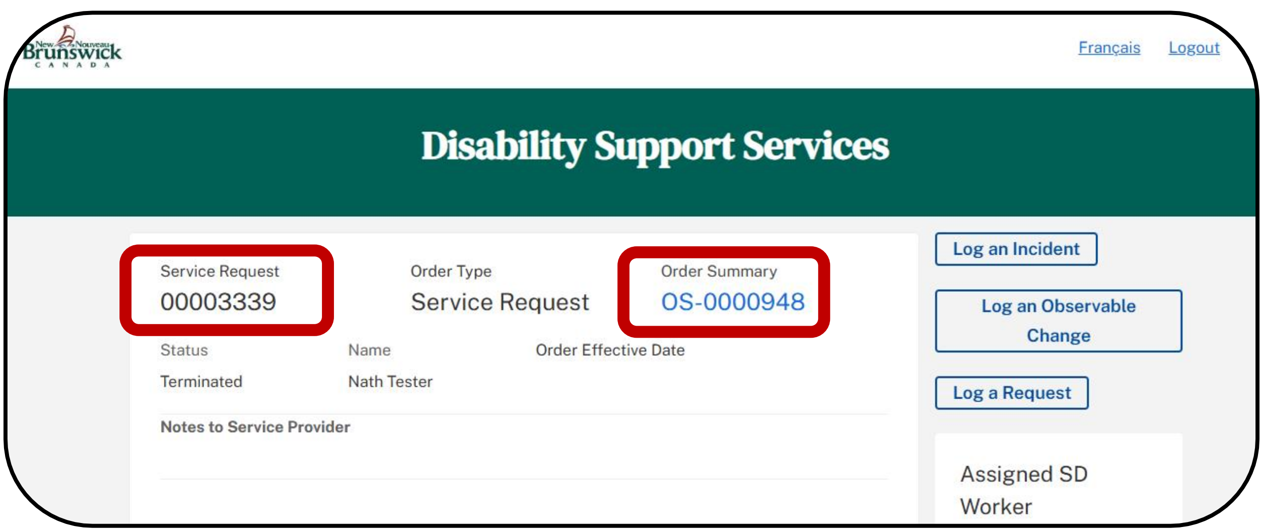
Once an Order has been Cancelled or Terminated, changes to the request can longer be made however, you do have the ability to log Miscellaneous Request through the **Log a Request** button.

1. Open the Cancelled or Terminated Order.

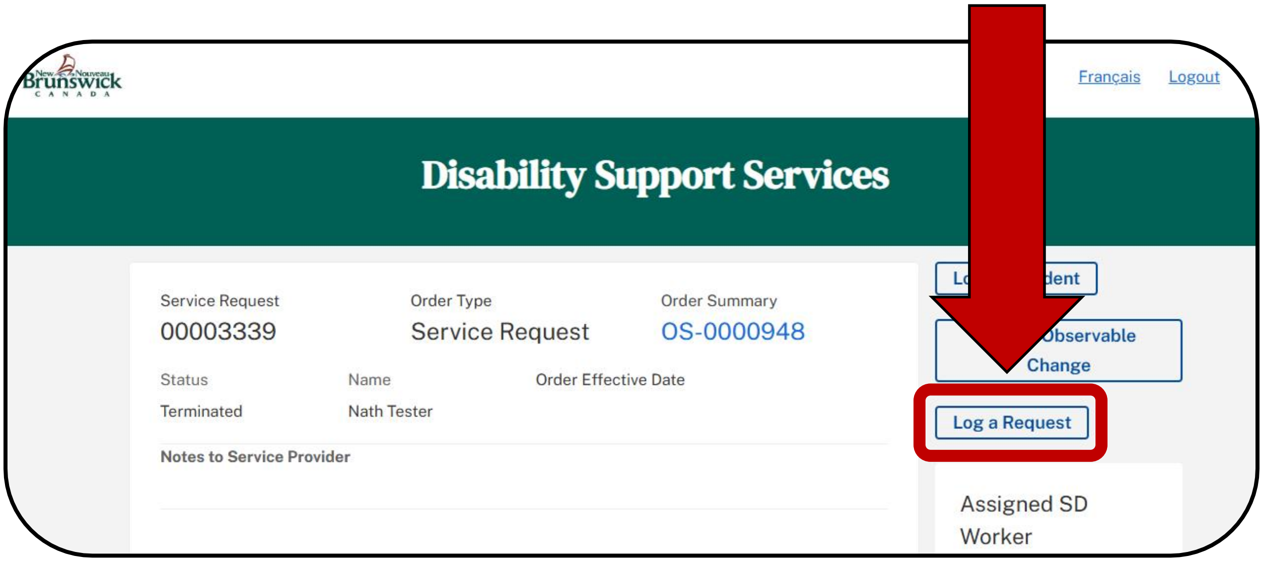
2. Once on the Order Summary, scroll down to the **Order Table** and locate the applicable Order Number but referencing the **Effective Date** column.



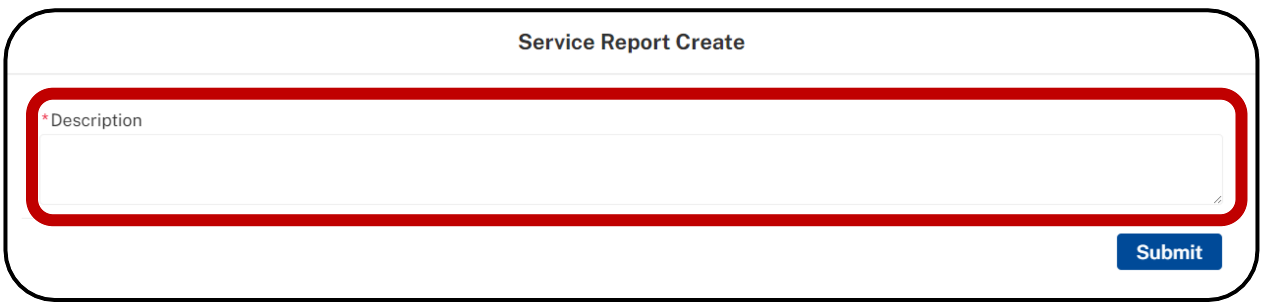
3. The Order is displayed with a link to return to the Order Summary (blue text).



4. Click the **Log a Request** button.

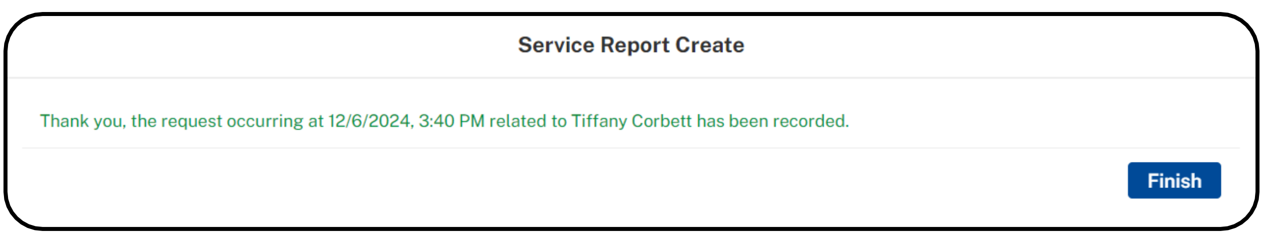


5. Capture the request description relating to the cancelled or terminated order and press **submit**.



6. A confirmation message is displayed.

7. Click **Finish**.



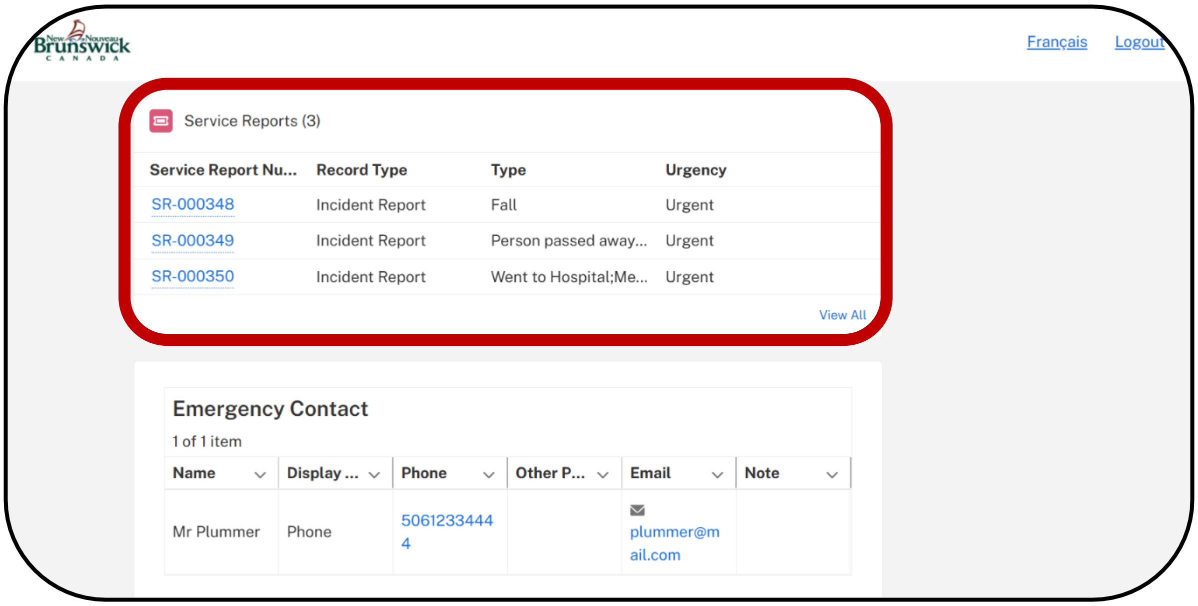
Logged Service Reports

Whenever a Service Report is logged (Change Request or Miscellaneous), the service report can be accessed either through an individual's order or view **all** client service reports through the Service Reports tile on the Homepage.

View Service Report from Order Summary

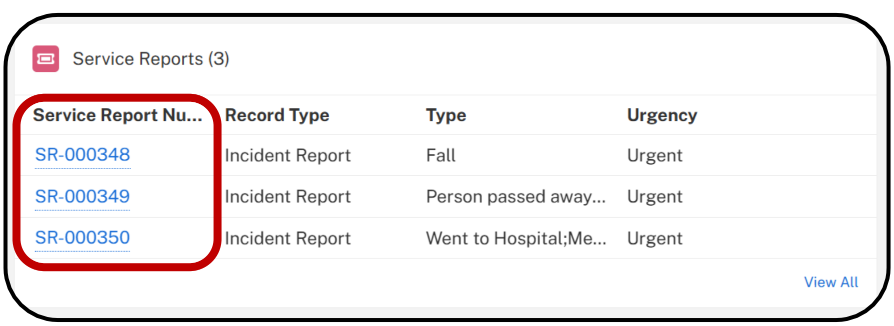
When searching for a specific client's Service Report, the most efficient way is to access the Service Report(s) through their individual order summary. This will only display service reports related to the individual order summary.

1. Navigate to and open the applicable client Order Summary (re: View Offered Orders)



2. Once on the Order Summary, scroll down and locate the **Service Reports** field.

3. Click the applicable **Service Report Number** hyperlink. To view more, select "view all".



Service Delivery Dashboard

The Service Delivery Dashboard provides insight into service requests and service reports. This dashboard consolidates data into various report types such as all/new/active/terminated/expiring service requests, mileage, service reports and more much more!

IMPORTANT: The Service Request Dashboard is currently in Beta, meaning that it is in full testing and feedback is greatly appreciated.

Navigate to Service Request Dashboard

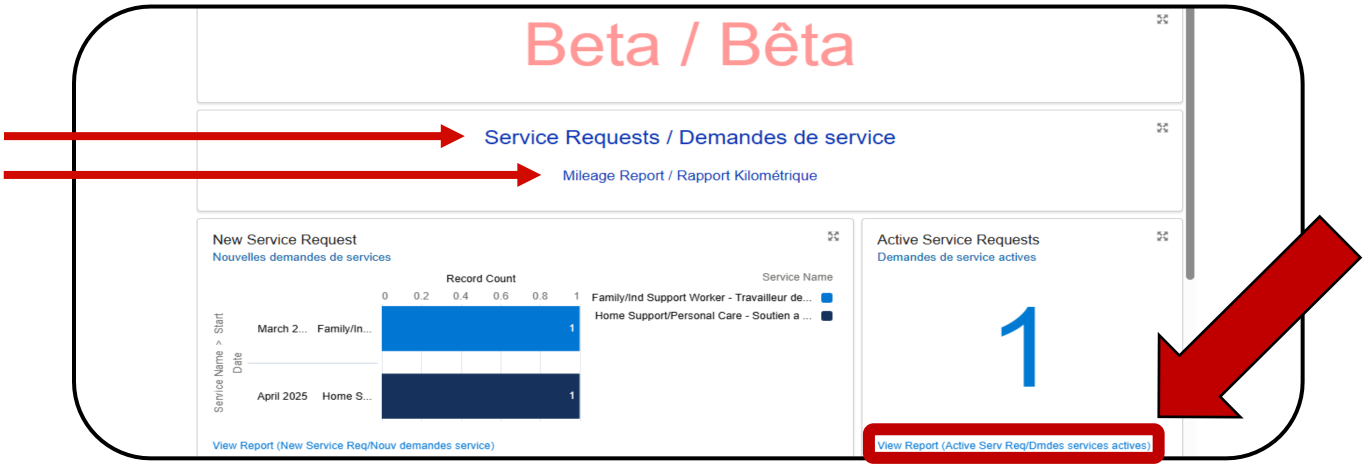
1. From the **Homepage**¸ click on the **Dashboard** tile.

2. The **Service Delivery Dashboard** is displayed.

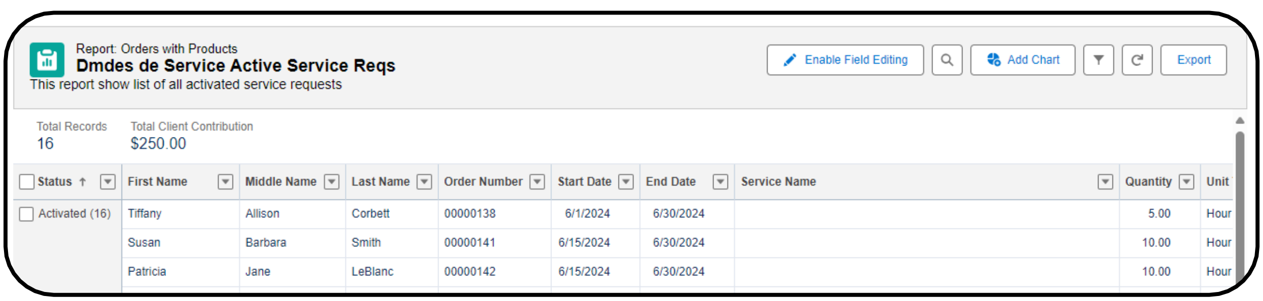
View Reports from Dashboard

From the Dashboard, the Care Coordinator can view individual details related to the displayed report types.

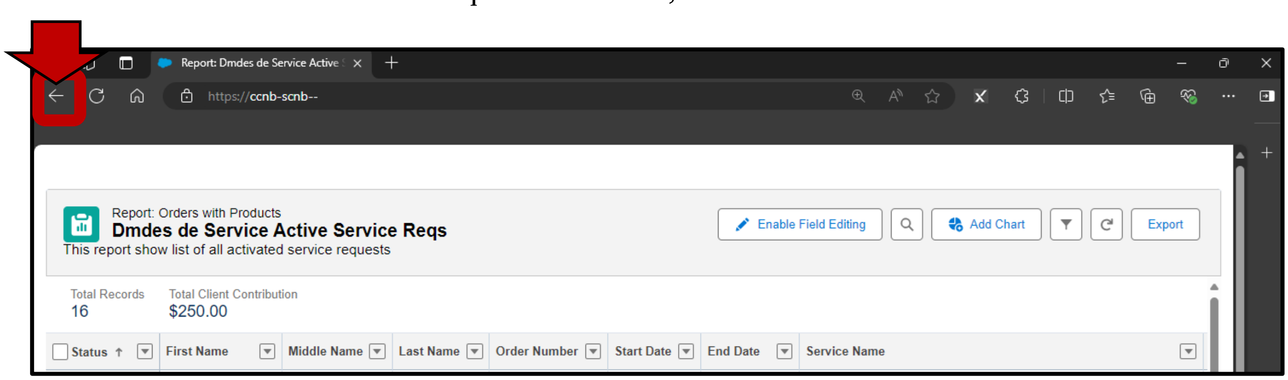
1. From the **Service Delivery Dashboard**, locate the applicable report type to view. The **View Report** hyperlink can be found at the bottom of any of the individual fields.



2. Once in the applicable **Report** window, a full list of related report items is displayed.

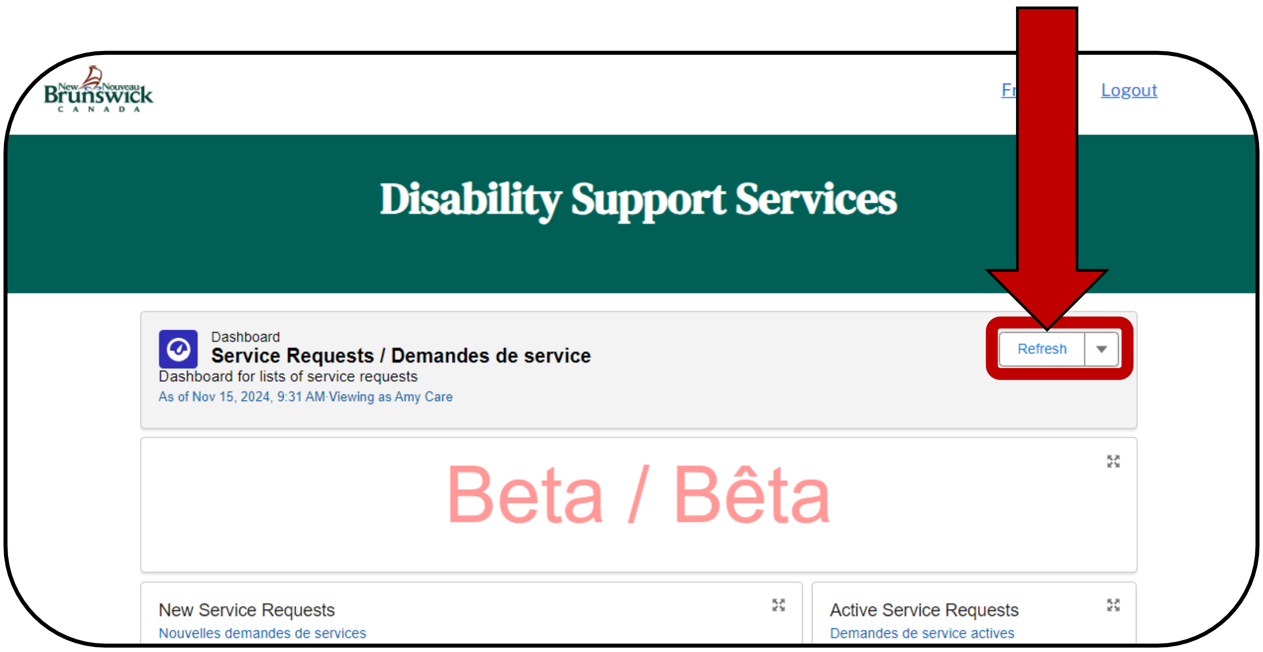


3. To return to the Service Request dashboard, click the **Go Back** arrow on the browser.



Refresh Data

If newly captured information is not displayed on the dashboard, or if the user wants to ensure that the most updated version is displayed, clicking the **Refresh** button reload and update all information displayed on the dashboard. This button must be used as the refresh button on the browser will not update the information.



APPENDIX

What do I need to get started?

All you will need is an internet connection. Social Development will provide Service Providers access to CommunityCareNB by creating a User Account and assigning each user with ONE persona that is based on their roles and responsibilities.

There are currently three types of personas (user access types) that Service Providers can be given. A Persona is a set of permissions in CommunityCareNB that provide and/or limit users' access to information or actionable items.

The following are the three types of persons (user access types) that a user can be given:

- **Financial:** the person(s) responsible for submitting invoices, ensuring payment for services.
- **Care Coordination:** the person(s) who receives service requests and confirms services, who submit incident reports and who would communicate with Social Development about an active client (e.g., request changes).
- **Financial & Care Coordination:** the person responsible for both financial and care coordination. This is common among service providers with fewer administrative staff.

Email Notifications

A notification will be sent to the Service Provider when a change to a service request status has been made. An Email will be sent for the following status changes:

- **Offered:** When an SD Worker offers an Order, the Service Provider will be notified via an email stating: "There is a new Service Request offer, please log into the portal to view". A link to the record is included in the email.
- **Activated:** Any time a change has been made to an Order Summary, the Service Provider will be notified via an email stating: "There is a new Service Request activation, please log into the portal to view". A link to the record is included in the email.
- **Rescinded:** If an SD Worker rescinds a service request after it has been offered, the Service Provider will be notified via an email stating: "Please note, a service request you received

(see order number below) is no longer available. This service request will **no longer** be visible in your ‘pending’ tab.”

- **Cancelled:** If an SD Worker cancels an order after it has been offered, the Service Provider will be notified via an email stating: “Please note, a service request you received (see order number below) has been cancelled and is no longer available.”

  NOTE: Unlike rescinded service requests, cancelled service requests are still visible to the Service Provider via the **Cancelled** tab on the Service Request page. Cancelled Service Request can still be billed against for the time it was active.

- **Terminated:** If an SD Worker terminates a service request, the Service Provider will be notified via an email stating: “There is a new Service Request termination, please log into the portal to view.” A link to the terminated record is found in the email.

  NOTE: Unlike rescinded service requests, cancelled service requests are still visible to the Service Provider via the **Terminated** tab on the Service Request page.

Sort Order List

When on tab (offered, active, terminated, etc.), the lists can be sorted. This can be done by selecting the headers of each column of the list view. When selected and depending on the column, it will reorganize the list (e.g., A-Z to Z-A, by date, least to greatest, etc.).