HEALTHeLINK™ HEALTHeNET™

Authorized Contact (AC) Portal Training Guide

January 19, 2024

v2.4

AC Portal Training Guide

Contents

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What is the Authorized Contact (AC) Portal?

The AC Portal is an application on the HEALTHeCOMMUNITY Portal; only ACs have access to the AC Portal. The AC Portal allows you to manage HEALTHeLINK and HEALTHeNET users by requesting new user accounts, deactivating users, and much more. Users at your practice(s) have access to personally identifying information (PII) and/or personal health information (PHI). Both data types are sensitive and must be protected. The AC permission is generally given to a practice/office manager or IT Manager, but is not limited to these roles.

What are the responsibilities of an Authorized Contact (AC)?

An "Authorized Contact" is the person(s) within your practice, facility or organization who will be responsible for the duties listed below. The AC may or may not also be the Privacy and/or Security Officer. If another individual serves in either of these roles, please identify them on the HEALTHeLINK Registration Application.

Responsibilities of the AC include:

Communication

- Provide HEALTHeLINK with a valid business email address to ensure delivery of important notices regarding enhancements, maintenance or outages, or other critical communications.

- Communicate all changes or additions in the practice address, email address, phone or fax numbers to your HEALTHeLINK account manager immediately.

- Communicate changes _prior to_ major business transaction such as mergers, sale or incorporation of your practice. Notification could be _critical_ to preserve your current Participation Agreement (PA) and patients' consent status. Notifications after the fact may result in the termination of your current PA and loss of your current patients' consents.
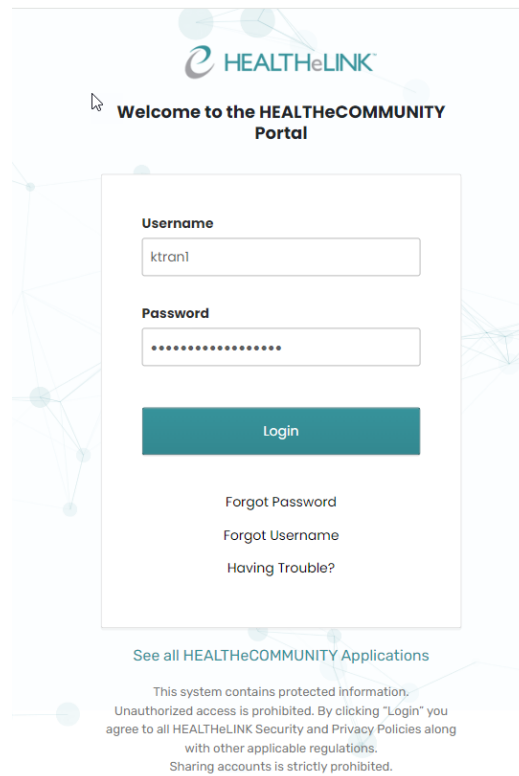
Administration

- Manage Authorized Users within the practice/organization by submitting requests through the AC Portal:
    o Deactivations must be reported within 24 hours of termination or role change that no longer requires use of HEALTHeLINK.
    o New User Requests – be sure to select options carefully based upon the user's role in the organization, i.e. need to view Clinical Results (Clinical) or Demographic Data/Consent Status only (Non-Clinical).
    o User Lists must be reviewed every 30 days. Failure to do so will block your ability to request any new users and may also result in the loss of access for all users at your facility.

**A practice may have more than one AC to manage multiple site practices. The AC will inform their HEALTHeLINK account manager of additional or new ACs.**

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Logging into the HEALTHeCOMMUNITY Portal

Log in to the HEALTHeCOMMUNITY Portal (www.wnylink.com) with your login credentials.

Help Desk Information: This can be found under 'Having Trouble?'

Messages

Authorized Contact Messages will display on the right. It will alert you if you have a Critical Message, Warning Message or Informational Message. Please make sure you view your messages and pass along information to your team as needed.

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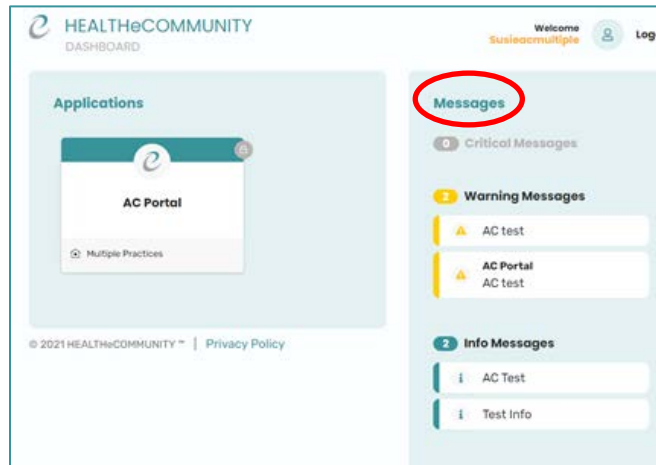
Accessing the AC Portal
Click on AC Portal badge to manage your users *(this may be 'hidden' under another badge)*.

DUO Authentication
HEALTHeLINK leverages DUO for multifactor authentication on AC Portal. If you need to set up DUO on your device, please refer to the DUO Security (TFA) Implementation Guide:
http://wnyhealthelink.com/wp-content/uploads/DUO-Security-TFA-Implementation-Guide.pdf.
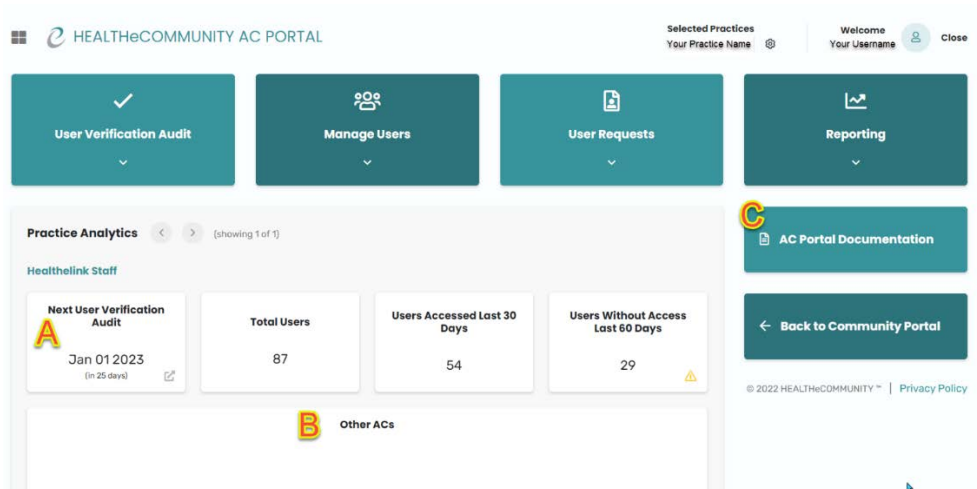
Attestation Agreement
In order to gain access to AC Portal, you must first read and accept the attestation.
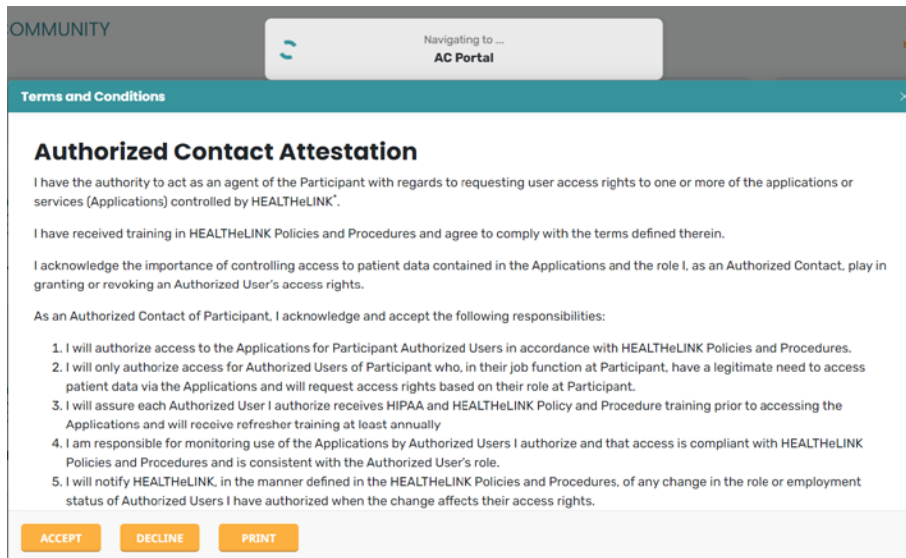
AC Dashboard

Upon logging into the AC Portal, the AC Dashboard will be displayed.

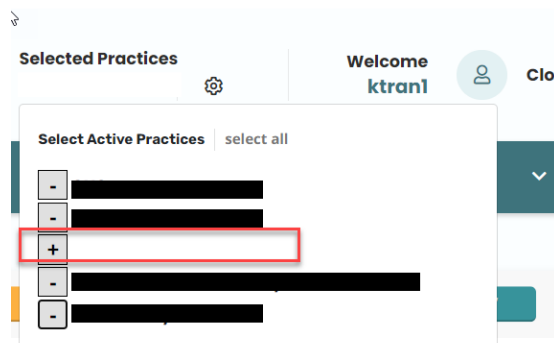The following categories will be reviewed in this document:

User Verification Audit
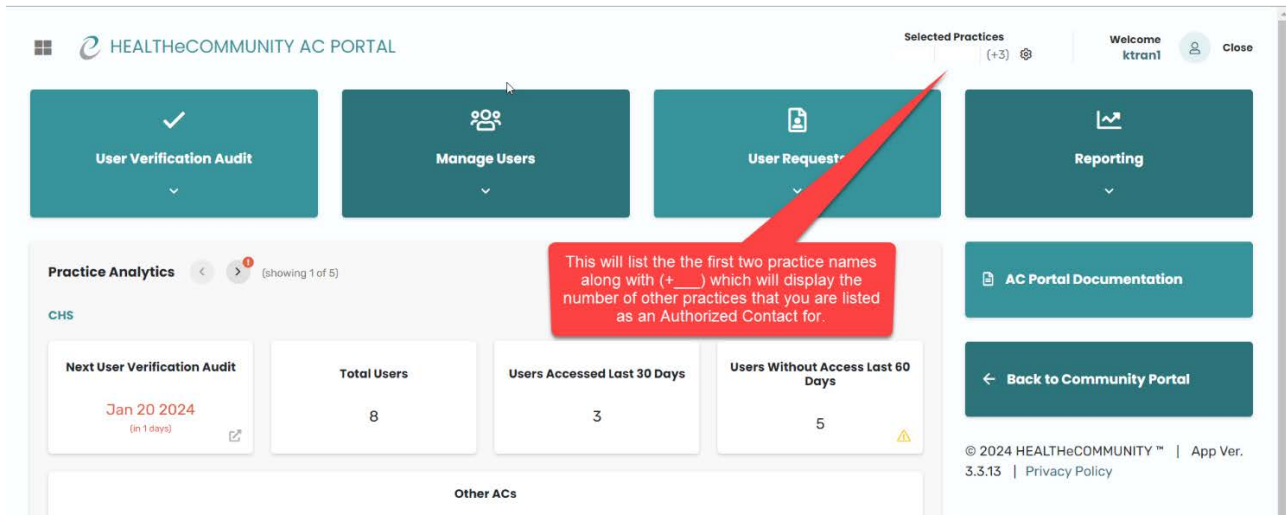Manager Users
User Requests
Reporting

Practice Analytics

A. Next user verification Audit: This will show when your next user list is due to be verified.
B. Other AC's: This will display the names of other AC's for the practice.
C. AC Portal Documentation: This document can be found in PDF form here.

Multiple Practice Authorized Contacts

If you are an AC that manages multiple practices, the *Selected Practices* feature provides you with options for managing a single practice or multiple practices at once. Click on the cog (⚙) to modify the practice(s) that will be displayed. All practices with the ➕ symbol next to it will be included in your user view. If you do not want to include a specific practice in your view, you will need to click on the button to have a ➖ displayed instead.

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This will list the the first two practice names along with (+___) which will display the number of other practices that you are listed as an Authorized Contact for.
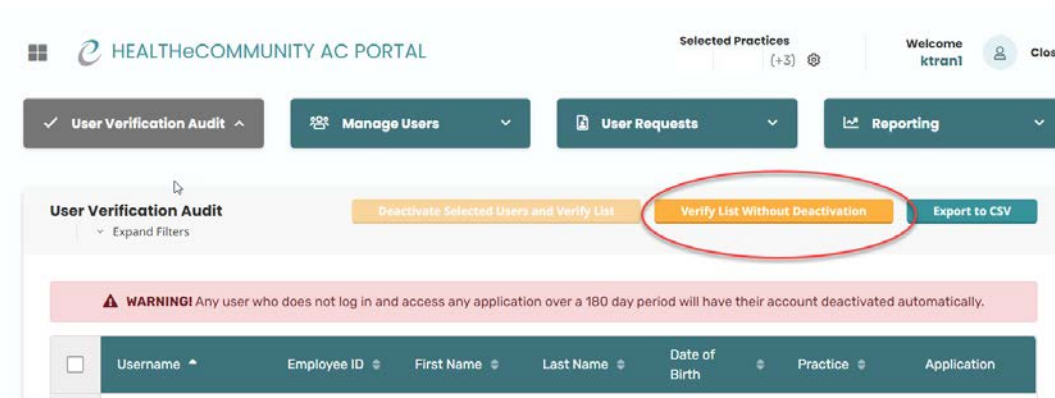
User Verification Audit

As an Authorized Contact, it is imperative that you verify your list of users every 30 days.

AC Portal will not allow you to set up a new user or submit any user requests, if you have an outstanding review that is needed on ANY practice that you are listed as an AC for.

The *User Verification Audit* page will allow you to quickly deactivate users, if appropriate, and validate the remaining users who do have access.

By verifying your user list, you are attesting to all users belonging to and active with your practice.

User Audit Verification

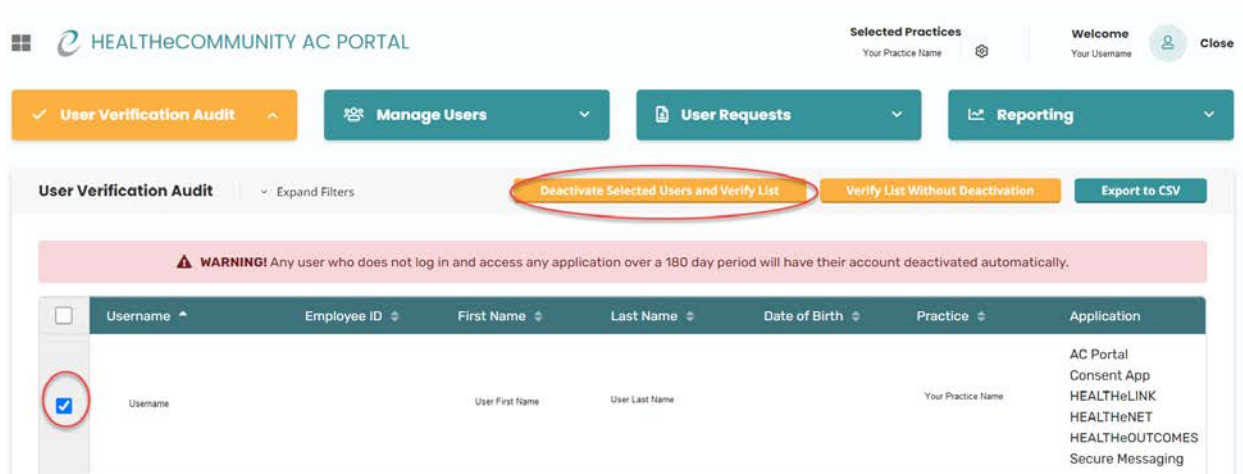I attest that the user list for my practice(s) is an accurate reflection of my current authorized users.

This action will effect **all** of your Practices.

Cancel   Continue

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Deactivating Users:

- Click on a user's name to view and edit their account. See the *Manage Users* section for additional detail regarding user profiles.
- Using the *Deactivate Selected Users And Verify List* button, select users to be deactivated and verify the list of users for your organization.
    - This will remove the user from your practice and remove all application they have assigned to them.
    - **Note: You are required to deactivate users within 24 hours of termination.**
- If no users need to be deactivated, verify your user list by clicking *Verify List Without Deactivation*

Manage Users
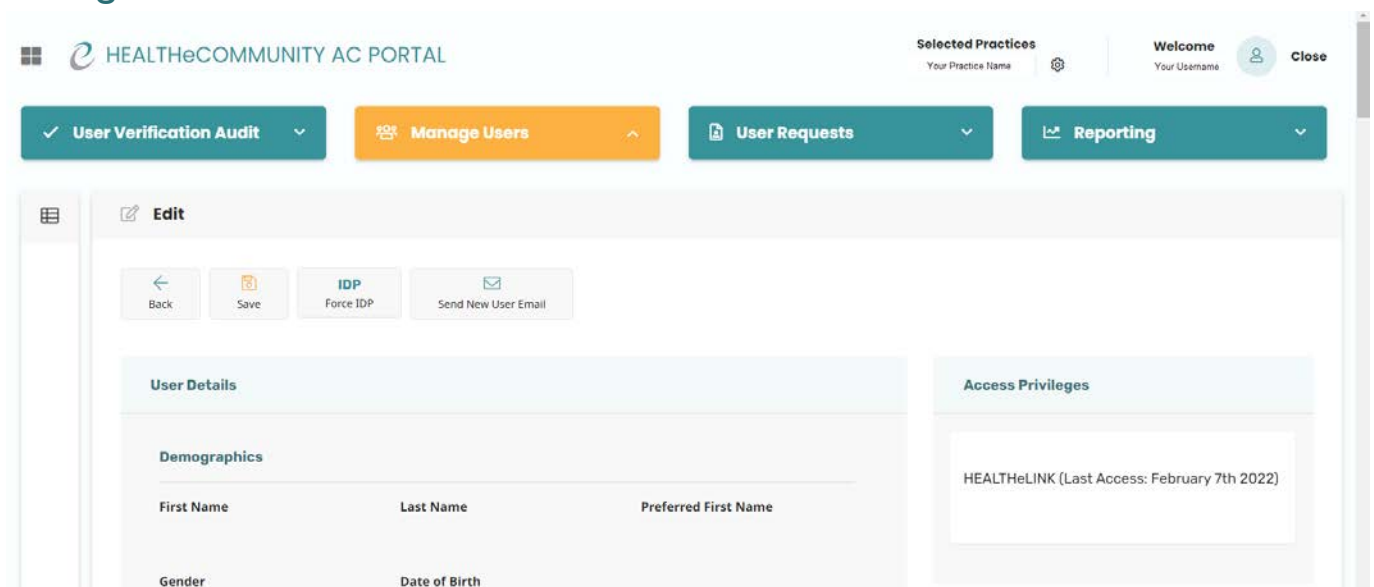
The *Manage Users* screen provides an alternate display of the users in your selected practice(s).

Users will be automatically deactivated if they have NOT accessed in 180 days.

When this occurs, an AC will need to submit a new user request.

This is applicable to the following permissions:

- HEALTHeLINK™
- HEALTHeNET™
- Consent Management Application
- Patient Alert Manager
- Secure Messaging
- HEALTHeOUTCOMES
- Highmark Blue Cross/Blue Shield of WNY
- Highmark Blue Shield of Northwestern NY
- I-STOP

Manual IDP (Identify Proofing)

When a user is unable to verify his/her identity using the self-service tools that are provided, the following error will appear on their screen:
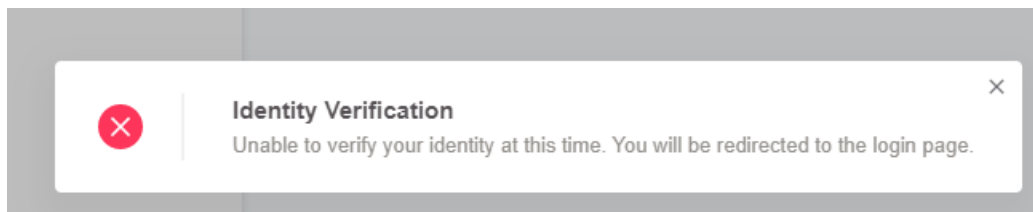
The user that has failed their identity verification will then be required to do one of the following options:

a) Have their identity manually verified **in-person** by an on-site <u>Authorized Contact</u> for their practice.
b) Call the HEALTHeLINK 24/7 Help Desk at 1-877-895-4724 or (716-842-6343).

The AC for that practice will also receive the following message in an email alerting them that one of their users was unable to successfully verify their identity:

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If a user fails identify proofing during new account set up, you can manually verify their identity by selecting the *Manual IDP* button. **This must be done in person or via Zoom or Microsoft Teams**. The user must show the allowed forms (see link below) to the AC to enter data into the system. These are audited to make sure an AC is adding the correct information from the documentation provided.
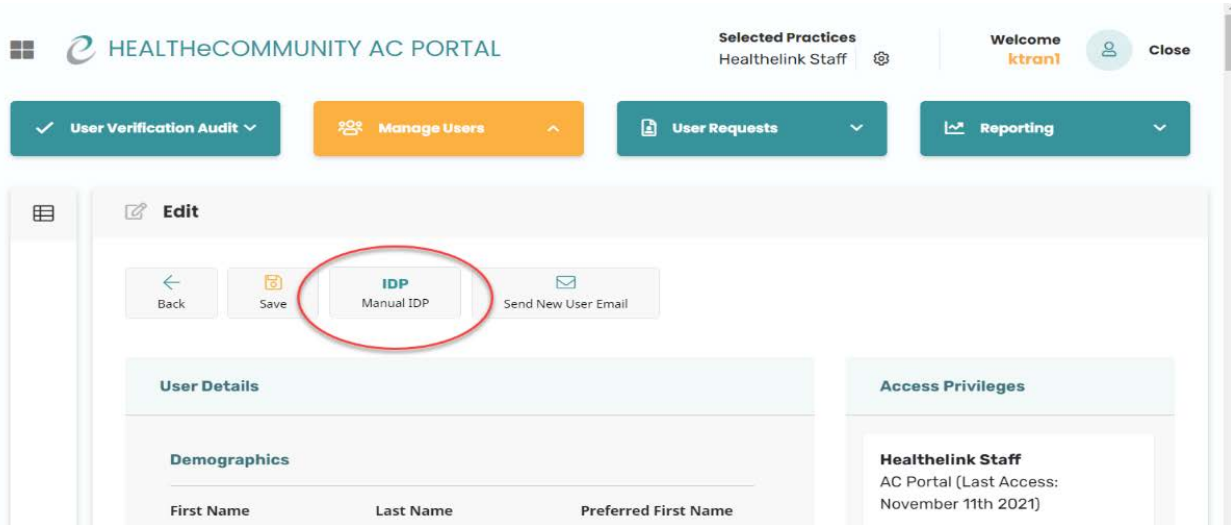
To manually verify your user's identity:

1. Log into your AC Portal, then click on "Manage Users".
2. Search for the User and click on "Edit" next to their username.
3. In the user's account, click on "IDP – Manual IDP".
4. Once you select "Manual IDP", the following screen will appear:

Items that are needed from the user to verify their identity:
- The user must be able to provide 2-3 acceptable forms of identifying documents.
- The documents that we can accept are designated as STRONG or FAIR. For a user to pass IDP, HEALTHeLINK requires the user to produce either 2 STRONG documents, OR 1 STRONG and 2 FAIR documents.
- Please reference the list of acceptable forms of identity:
  https://wnyhealthelink.com/physicians-staff/training-materials/manual-identity-proofing-idp/

5. Complete the form using the following info:
   a. Reason: Failed Identity Proofing
   b. Method: Verified Photo Identification
   c. Forms of ID – Fill out required fields (Refer to the accepted forms of identification documents).
   d. Toggle the button over that says, "I attest that I have verified……."
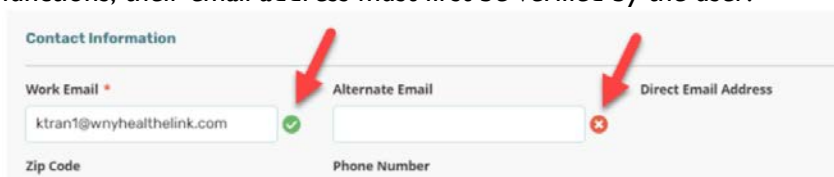   e. Click "Submit"

Instructions for Authorized Contact

As the Authorized Contact, you are required to view these documents in person to determine the validity. Please note that:

- You must capture the last (4) alphanumeric characters of the unique identifier for each piece of evidence.
- Expired identifying documents are <u>NOT</u> acceptable.
- The full name on the issued evidence must match the name that the person was officially known by at the time of issuance. (Not permitted: pseudonyms; aliases; an initial for surname; initials for all given names).
- Issued Evidence must contain a photograph or biometric template (of any modality) of the person to whom it relates.
- All manual identity verifications will be audited by HEALTHeLINK.

Verifying An Email Address

In order for a user to be able to utilize the "Forgot Username" and "Forgot Password" self-service functions, their email address must first be verified by the user.

1. Log-in to HEALTHeLINK and go to your AC Portal.
2. Click on "Manage Users"
3. Scroll down until you find the specific user, and click on the "Edit" button next to the username.
4. In the user's account, scroll down to the "Contact Information" and look at the symbol next to their email address.

a. If there is a green check mark, the user has already verified their email address and no further action is required.
b. If there is a red circle with an "X" shown next to the "Work Email" address, click on the X symbol, and it will automatically send an email to the user with a link to verify their email address.

5. The verification email to the user will come from: noreply@wnyhealthelink.com with the subject listed as "HEALTHeCOMMUNITY Portal: Email Confirmation".
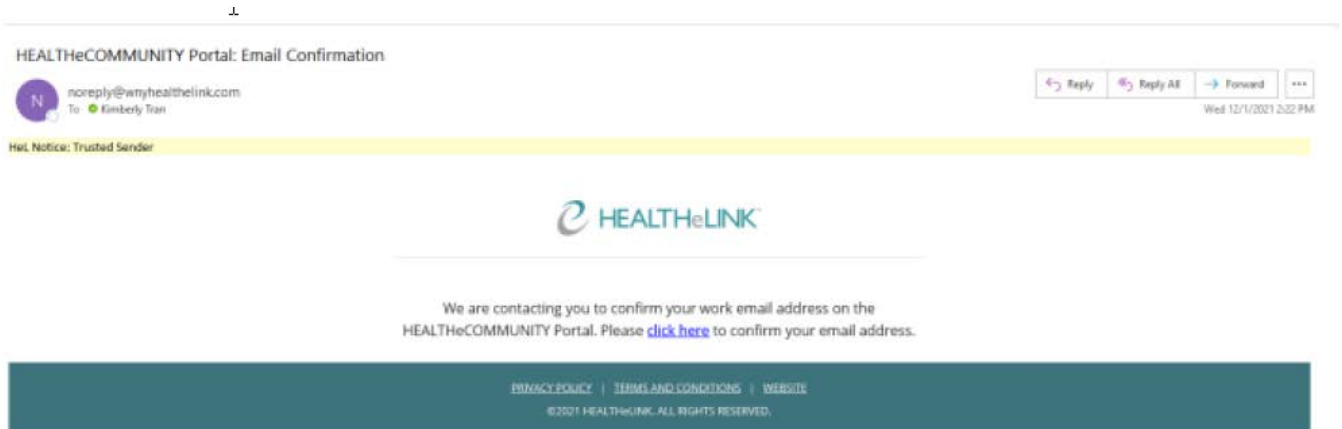

6. Once the user has pressed on the "click here" button and verified their email address, a green check mark will then be displayed next to their email address when in the AC Portal and viewing their HEALTHeLINK user account under "Manage Users".
7. The user will now have the ability to utilize the "Forgot Username" and "Forgot Password" functions at the log-in screen if needed.

New User Email Function

The "Send New User Email" button that is shown at the top of the user's profile account, should **ONLY** be used if the user is a NEW portal account user and cannot locate their new user activation email.

Please note: *If this button is clicked on for an existing user, this will override any saved data and will force the user to reset their security questions AND complete their identification process all over again.*
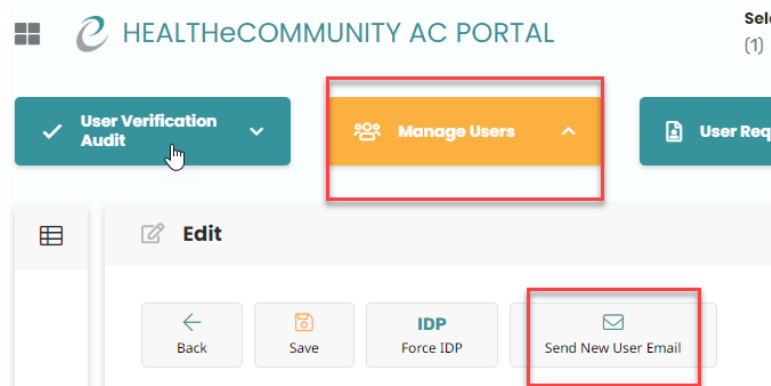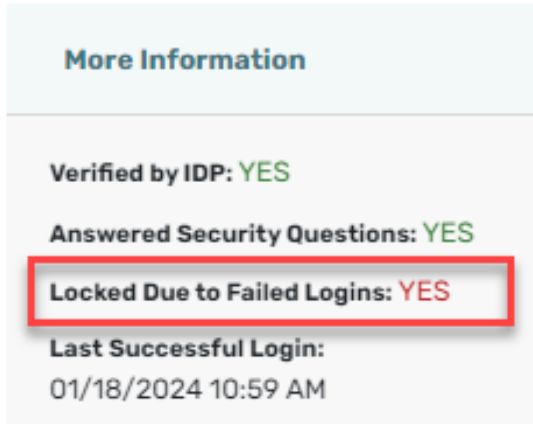
How to tell if a user is "Locked Out"

Below is what it should look like if a user's account has no issues (2 green "Yes", and 1 red "Yes").

If a RED "Yes" appears next to **Locked Due to Failed Logins,** please reach out to your account manager to help you unlock this user.

More Information

Verified by IDP: YES

Answered Security Questions: YES

Locked Due to Failed Logins: YES

Last Successful Login:
01/18/2024 10:59 AM

Submitting a User Request:

Any time a new staff member is hired, you will need to request HEALTHeLINK / HEALTHeNET access for the user for your practice via the AC Portal. Even if the user already has an existing HEALTHeLINK / HEALTHeNET account through a previous practice, a new badge needs to be requested. All access is site specific and therefore should only be using the CURRENT practice's badge.
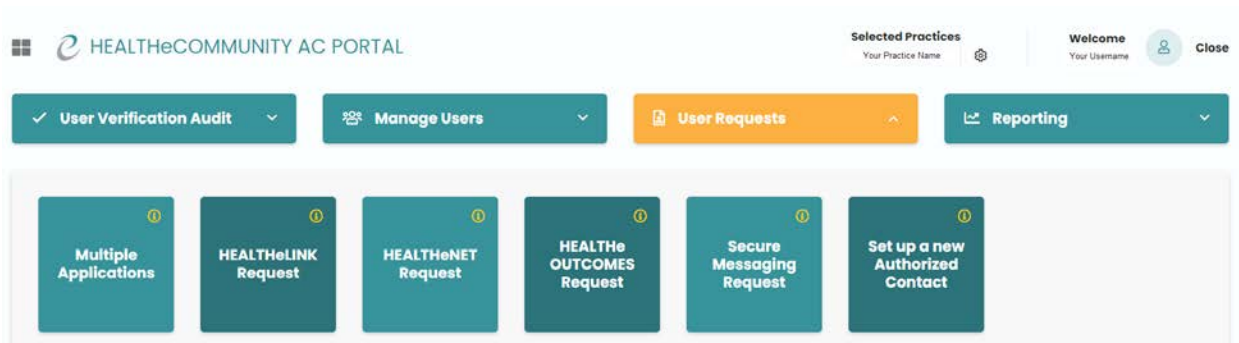
If **ALL** badges are disabled (greyed out) this can be due to an outstanding verification audit for the selected practice (or one of your other practices if you are listed as an AC for multiple practices). Once you complete the verification process, you can return to this page to continue the user request.
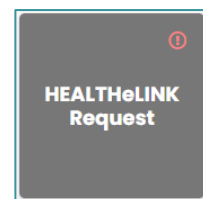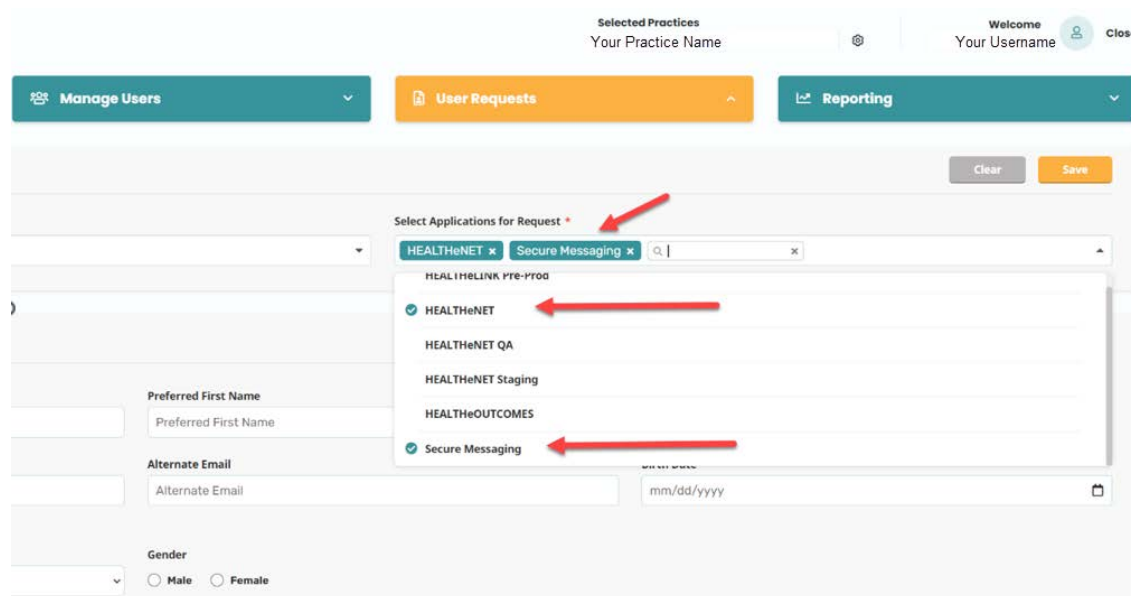
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Why are some of the boxes grey and others not: The applications you can request are determined by your permissions with the practice that is selected. To request additional permissions, please contact your HEALTHeLINK Account Manager.

1. Log in to your AC Portal
2. Click on "User Requests"
3. Select the application that you are needing for the user

Multiple Applications:

4. You can submit a request for a single application, or multiple applications at once by clicking *Multiple Applications*. Each application can only apply for a single practice.
5. Selecting multiple applications:
   a. If you are needing more than one application, select "Multiple Applications"
      i. Under "Select Applications for Request" you can then add multiple services and then click "Save".

6. Only items with a **red *** are required to be completed in the application.

First Name *	**Preferred First Name**	**Last Name ***
First Name	Preferred First Name	Last Name
Email Address *	**Alternate Email**	**Birth Date ***
Email Address	Alternate Email	mm/dd/yyyy
Necessary for identification purposes		
Authentication Method *	**Gender**	
⌄	○ Male ○ Female	

Each user must have their own email address. **NEVER** use an email that is shared. You may use the account holders professional or personal email, but it must be an email that is only accessible by that user. The email that is entered is where the account activation email will be sent, as well as any future notifications or self-service emails.

Note: *If the user already has an existing account but you are adding a service or requesting a new badge for a new practice, please put in this field "This user has an EXISTING account under the username: (list the user's HEALTHeLINK username)".*

When submitting the request, Job Category (HEALTHeLINK™ Only) will determine whether results can be viewed.

- **Clinical Staff:** users will have access to results in HEALTHeLINK.
- **Non Clinical:** users will NOT have access to patients clinical records. Only demographic information will be available.

HEALTHeLINK Job Category *

🔍

Resident

Clinical Staff ← Users that need access to RESULTS in HEALTHeLINK

Other Clinical Specialist (e.g., dentist, podiatrist, pharmacist, PT/OT, etc.)

✔ Organ Transplant User

Non Clinical ← Users for demographic access with NO RESULTS

When to choose additional fields:

The applications you can request are determined by your AC portal permissions that you were originally granted.

> **I-Stop:** Provides single sign on ability to the NYS Prescription Monitoring Program site.

As a courtesy, HEALTHeLINK™ provides the badge to access I-Stop once you have created your account through New York State:

https://www.health.ny.gov/professionals/narcotic/prescription_monitoring/

Managing Consent: Allows user to manage consents at practice.

Substance Use Disorder: allows access to Part 2 Data.

EMR User ID

[EMR User ID]

HEALTHeLINK Job Category *

Clinical Staff (access to results) ▼

⬜ This user has an existing I-STOP account and would like Single Sign On through HEALTHeCOMMUNITY Portal.

⬜ This user will be managing HEALTHeLINK consent. If checked, select method from below.

⬜ This user should be permitted to access a patient's Substance Use Disorder information that is subject to 42 CFR Part 2 regulations.

🔵 This user will be managing HEALTHeLINK consent. If checked, select method from below.

Method *

◯ HEALTHeNET (must have an existing HEALTHeNET account)

◯ HEALTHeLINK Consent Management Application

Adding a Provider:

When submitting a request for a provider, you will notice that a few additional options appear based on what type of access the provider needs.

If your practice is setup with our Results Delivery service, each of your providers must be set up in your provider group to ensure that the users at your practice are able to manually push results directly from HEALTHeLINK into your EMR.

1. This option will set up the provider in the provider group for Results Delivery ONLY. This will NOT give the provider a username and password to access the HEALTHeLINK portal.

2. To ensure that the provider's results are being sent to the correct destination, this MUST be selected if the provider practices out of more than one location.

3. This option will set up the provider in the provider group for Results Delivery AND give them a username and password for portal access to look up patient records.

4. This should be selected if your practice is already receiving ADT (Admission/ Discharge/Transfer) Alerts based on your monthly patient list upload. This adds the new provider you are registering to your current monthly subscription.

1. Once you have Saved the request – a banner will appear stating that the request was submitted successfully. The request will then automatically be sent to our Servicing Department for the account to be built.
   a. If the user request is for a brand new user who does not have a currently active HEALTHeLINK™ / HEALTHeNET™ portal account, the user will receive an email typically within 24-48 hours to the email address listed in the request from noreply@wnyhealthelink.com. The email will include the user's new username, along with directions to activate their account.
   b. If the request is for a user who has an active HEALTHeLINK™ / HEALTHeNET™ portal account already, but you are just requesting a new permission or access via an additional access site, ALL of the user's information will remain the same, but they will just have an additional badge added to their portal account once the service has been added.

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Setting up a New Authorized Contact
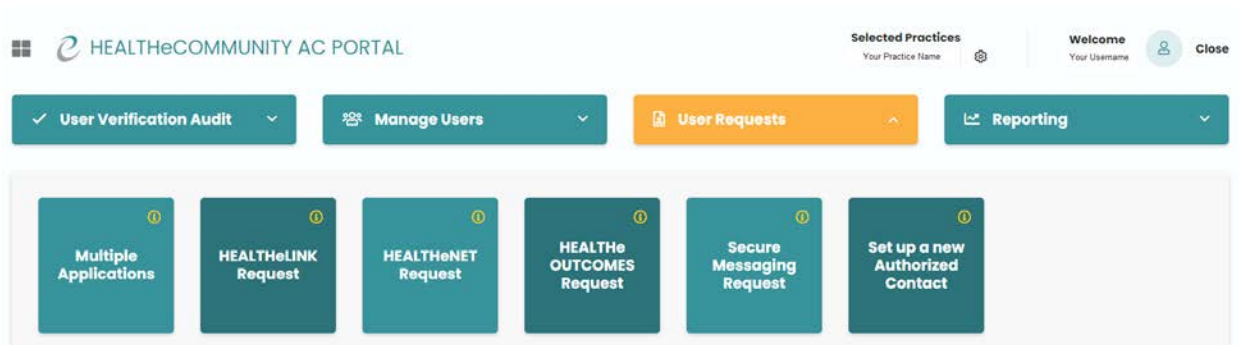
1. To setup a new Authorized Contact you will need to have the following required fields:
   a. PIN # (This can be any 4-digit pin the user would like and is only used for identification purposes).
   b. Applications (The AC will be able to request permissions ONLY for the applications that you select. If there should not be any limitations, you may select all applications listed).
   c. If you are approving for the new Authorized Contact that you are currently setting up the ability to also setup other Authorized Contacts, please move the toggle for "Allow Authorized User Requests".

2. Click "Save" in the bottom right-hand corner.
3. Once you have Saved the request – a banner will appear stating that the request was submitted successfully. The request will then automatically be sent to our Servicing Department for the account to be built.

   If the new Authorized Contact is for a brand new user who does not currently have an active HEALTHeLINK™ / HEALTHeNET™ portal account, the user will receive an email typically within 24-48 hours to the email address listed in the request from noreply@wnyhealthelink.com. The email will include the user's new username, along with directions to activate their account.

   If the new Authorized Contact has an active HEALTHeLINK™ / HEALTHeNET™ portal account already, but you are just adding the Authorized Contact permission, ALL of the user's information will remain the same, but they will just have an additional badge added to their portal account once the service has been added.

4. Please reach out to your Account Manager following the submission of your new AC Request to setup an AC Portal training session with the new Authorized Contact.

Reporting

Reporting allows you to see what you and other AC's in your practice have set up or deactivated. Enter the AC's username and any activity by this AC will be displayed. This can also be exported to an Excel CSV file.

Help and Support

For more information or training on the AC Portal, please call HEALTHeLINK/HEALTHeNET Support at 877-895-4724 or 716-842-6343 or email support@wnyhealthelink.com.

Additional training materials are available on our HEALTHeLINK website.

Link to monthly AC Portal Webinars: https://wnyhealthelink.com/physicians-staff/training-materials/webinars/