Subscribe and Notify (SN) Practice Training Guide for Practices with Alerts by Organization

February 20, 2026

v2.2

Table of Contents

What is Subscribe and Notify?

Subscribe and Notify is a service that allows practices to receive Patient Alert Notifications. This enables practices, care coordination networks or other organizations/facilities to receive hospital (Inpatient and Emergency Department) Admission, Discharge and Transfer (ADT) notifications for patients with a "Yes" or "Unknown" consent value whom they have a treating relationship. This is done by setting up a subscription for a patient through HEALTHeLINK Alerts by Provider(s) or Organization

Alerts by Provider(s) or Organization

Alerts by Provider(s): The practice will upload a list of patients by provider. This is typical when providers within a practice or organization have a care manager/nurse/staff person who works directly with him/her and can manage their panel of patients. This is required if alerts are sent directly to an EMR via the results delivery feed. ***Please Note:*** The provider must have an account set up with HEALTHeLINK for results delivery. This option is for direct mail account delivery or batch alerts.

Alerts by Practice/ Organization (Generic Provider): The practice will upload a list of patients, and a generic provider name is used on the patient list (HEALTHeLINK will provide the name which will be added to the Patient Alert Import Sheet). One or more people can manage the alerts. This is typically used when alerts are sent to a Direct Mail account that is provided by HEALTHeLINK. This is also an option for batch alerts when using HEALTHeLINK's MaxMD (Secure Messaging).

Delivery via Batch or Real-Time

Batch Alerts: These alerts will be sent every 24 hours in an HTML format.

Real-Time Alerts: These alerts are sent individually to a HEALTHeLINK MaxMD Secure Messaging Account accessed through your HEALTHeCOMMUNITY™ Portal account. Real-Time Alerts can be sent via HEALTHeLINK MaxMD Secure Messaging or Direct Mail via a connected EMR interface.

Subscription Roles

PAM Badge Owner

The PAM (Patient Alert Manager) Badge Owner is the person at the practice that will be responsible for uploading the monthly patient list via the HEALTHeCOMMUNITY Portal. This person will oversee making any updates to the patient list, ensuring that the list upload is successful, and managing the error report to correct any invalid data fields for future uploads.

Alert Recipient

The Alert Recipient(s) is the person that the ADT alerts will be delivered to.

SN Audit Recipient

The Subscribe and Notify Audit Recipient will be the person that receives the monthly reports that identify the current consent values of your patients, based upon your patient list upload.

MaxMD (Secure Messaging)

MaxMD Account

The MaxMD account refers to the organizational secure messaging account. HEALTHeLINK will provide access to all employees/staff members that require necessary access to manage alerts.

Shared Inboxes

HEALTHeLINK will allow you to share a MaxMD (Secure Messaging) account which will allow user(s) access to the shared inbox. This is common when a provider has a set nursing staff who works directly with them and are all needing access to manage the provider's patient alerts

Things to know before requesting shared inbox access:

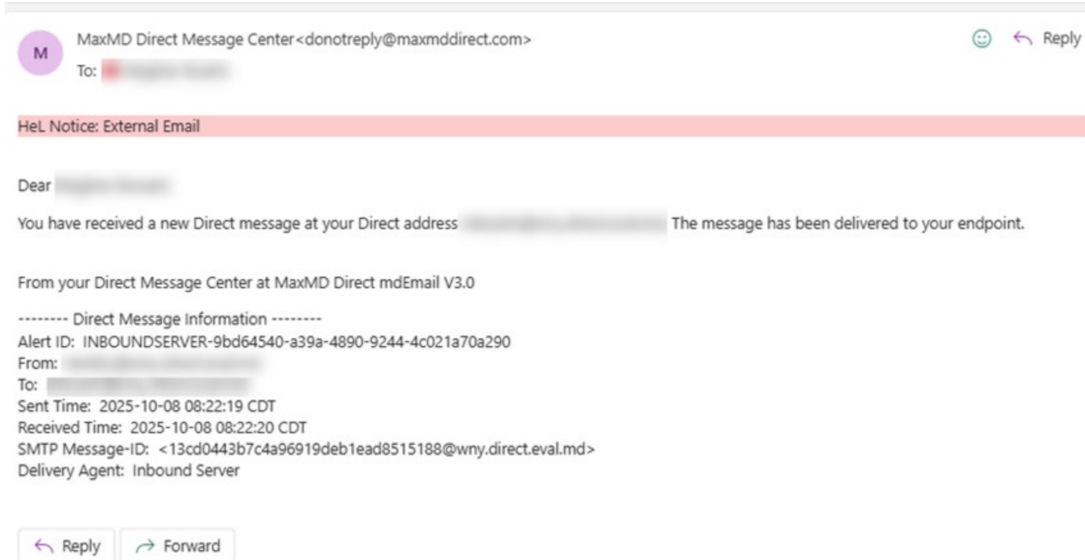
- Please be aware that this is a LIVE mirrored account. This means that if a user deletes a message, it will delete the message for all users across all platforms.
- In order to give a user access, they must first be setup with a MaxMD (Secure Messaging) account. If the user does not already have that permission, the Authorized Contact for your practice will need to submit a user request via the AC Portal, and request that the "Secure Messaging" permission be added to the user's portal account.
- To request or remove a user's access to a specific shared inbox you must reach out the HEALTHeLINK Help Desk or your Account Manager.

Receiving Patient Alerts

Alerts Received into HEALTHeLINK's MaxMD Secure Messaging

Your patient alerts will be received via your DIRECT.WNYHEALTHELINK.COM MaxMD (Secure Messaging) account. Please note that the alert will not contain significant details of the patient's encounter. It is strictly to there to notify you that the patient has been either admitted, discharged, or transferred from a hospital. Your practice is responsible for managing the patient alerts and following up with the patients as necessary.

Through your Mirth Mail (Secure Messaging) account, you will be able to view the patient alert and then click on the hyperlink that will bring you directly to the patient's chart inside of HEALTHeLINK. You will also have the ability to make this Mirth Mail account shareable so that delegates can be setup for nursing staff to help manage the patient alerts.



MaxMD Direct Message Center<donotreply@maxmddirect.com>

To:

Reply

HeL Notice: External Email

Dear

You have received a new Direct message at your Direct address The message has been delivered to your endpoint.

From your Direct Message Center at MaxMD Direct mdEmail V3.0

-------- Direct Message Information --------
Alert ID: INBOUNDSERVER-9bd64540-a39a-4890-9244-4c021a70a290
From:
To:
Sent Time: 2025-10-08 08:22:19 CDT
Received Time: 2025-10-08 08:22:20 CDT
SMTP Message-ID: <13cd0443b7c4a96919deb1ead8515188@wny.direct.eval.md>
Delivery Agent: Inbound Server

Reply Forward

Through your MaxMD (Secure Messaging) account, you will be able to view the patient alert and then click on the hyperlink that will bring you directly to the patient's chart inside of HEALTHeLINK.

Patient List

Requesting Patient List From Your EMR

Depending on your EMR, you may be able to have this patient list generated automatically, however you will need to reach out to your EMR representative to see if this is possible. The patient list that is required to upload to HEALTHeLINK's Patient Alert Manager, must follow the SN Patient List Guide.

If your EMR is not able to support this, your practice will be responsible for manually ensuring that your patient roster it is kept up to date by adding or removing patients that are in your care.

Please note that the patient roster can only be submitted using the SN Patient List Guide, and this will also need to follow the SPEC sheet of how data must be entered and formatted.

SPEC Sheet

This table indicates the required format for patient lists submitted for HEALTHeLINK Subscribe & Notify, the process of delivering patient alerts based on subscription. Please ensure the list conforms to this format when submitting to the Patient Alert Manager, so that patients may be added successfully to your subscription(s).

Other requirements include the following:

- **The patient list must be saved in CSV, XLS, or XLSX format. Files larger than 5 MB must be saved as CSV.**
- **Commas should not be present in the content of the file. Data columns may shift during validation if commas are present.**
- **All columns should use Text formatting. Data columns may not validate correctly if formatting other than text is used.**
- **Non-required data must either follow the indicated formatting below or be left blank.**

- **All columns (required & non-required) must be present and in the order indicated below, even if left blank.**
- **Verify that all MRNs shown in Column A are correct and match the MRN shown in EMR.**

1 (A)	**MRN**	**Y**	**MRN (or Medical Record Number) is a practice generated unique identifier, no spaces – CANNOT BE BLANK**
2 (B)	**Last Name**	**Y**	**No numbers or special characters – CANNOT BE BLANK**
3 (C)	**First Name**	**Y**	**No numbers or special characters – CANNOT BE BLANK**
4 (D)	Middle Name	N	No numbers or special characters
5 (E)	**Street Address 1**	**Y**	**1 or more numbers followed by any combination of letters and spaces, no special characters – CANNOT BE BLANK** *It is highly recommended that a true street address is included in this field. **EXCEPTIONS** (If patient's true street address is unavailable) Patient has no home address - Put **HOMELESS** Patient's address is unknown - Put **UNKNOWN** Patient's given address is a shelter - Address must end with **SHELTER** or **HOME** Patient's given address is a jail/prison - Address must end with **JAIL** or **PRISON** Patient's given address is a PO Box - Address must begin with **PO BOX**
6 (F)	Street Address 2	N	*Apartment number, building number, PO Box, etc. should be included here
7 (G)	**City**	**Y**	**No numbers or special characters – CANNOT BE BLANK**
8 (H)	**State**	**Y**	**Must contain either New York or NY, all other states and provinces must use 2-letter abbreviation, no numbers or special characters – CANNOT BE BLANK**
9 (I)	**ZIP**	**Y**	**5 or 9 digits (or A1A1A1 format for Canadian postal codes) – CANNOT BE BLANK**
10 (J)	**Date of Birth**	**Y**	**Must be in one of three formats: yyyymmdd | mm-dd-yyyy | mm/dd/yyyy – CANNOT BE BLANK**
11 (K)	**Gender**	**Y**	**M, F, O, or U – CANNOT BE BLANK**
12 (L)	Social Security Number	N	012345678 - 9 digits – *By default Excel drops preceding zeros, be sure to format accordingly
13 (M)	Home Phone	N	10 or 11 digits – preferred format is (123)456-7890
14 (N)	Work Phone	N	10 or 11 digits – preferred format is (123)456-7890
15 (O)	***Provider Last Name**	**Y**	**This will be used for setting the subscription – CANNOT BE BLANK** *Generic Provider name may also be used. Please discuss with your HEALTHeLINK Account Manager.
16 (P)	***Provider First Name**	**Y**	**This will be used for setting the subscription – CANNOT BE BLANK** *Generic Provider name may also be used. Please discuss with your HEALTHeLINK Account Manager.
17 (Q)	**Provider NPI**	**Y**	**CONDITIONAL –** **1) REQUIRED – If you are subscribing a real provider** **2) BLANK - If you are subscribing with a generic provider name, Example: PRACTICE, ABC**

Patient List Guide

The patient import template will be your guide on the exact layout of how each field must be filled with your patient list. Please contact your HEALTHeLINK Account Manager if this has not already been provided to you.

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Last Name (No numbers or special characters)	First Name (No numbers or special characters)	Middle Name (No numbers or special characters)	Street Address 1 (Street # followed by street name. See SN Patient Import Spec Sheet for list of exceptions)	Street Address 2	City (No numbers or special characters)	State (Either New York or NY, 2-letter abbreviation for all other states)	ZIP or Postal Code (5 or 9 digits, or A1A1A1 fomat)	DOB (One of the following formats: yyyymmdd|mm-dd-yyyy|mm/dd/yyyy)	Gender (M,F,O, or U)	SSN (9 digits, no dashes)	Home Phone (123)456-7890	Work Phone (123)456-7890	Provider Last Name	Provider First Name	*NPI (Required if using a real provider. Must be left blank if using a generic provider name.)
2																
3																
4																
5																
6																
7																
8																
9																
10																
11																
12																
13																

Uploading Patient List to HEALTHeLINK

Monthly Patient Subscription Report

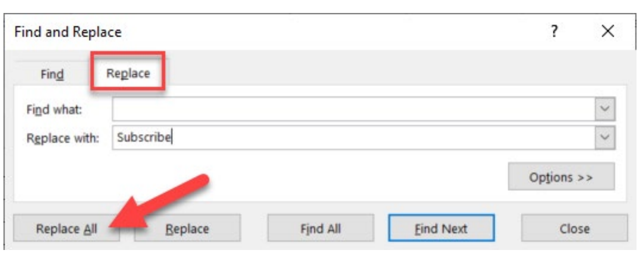
Patient lists must be uploaded once a month via the Patient Alert Management app in HEALTHeLINK to avoid your subscription from being deactivated.

"Generic Provider" Patient List

When subscribing to your patient alerts by "Generic Provider", you will be responsible for editing a few of the columns on your patient list spreadsheet.

If your EMR has been able to provide you with a Custom Report with columns "O", "P", and "Q" automatically changed to display your practice's generic first and last name, and the NPI field left blank, you may skip to "Saving the Patient List Excel File" on the next page.

1. Column "O" = Dr. Last
    a. Click on the Letter "O" to select the entire column (Dr. Last)
    b. Once entire column is highlighted (less the Column Heading row), right click and select "Clear Contents"
    c. With column still selected, you will then hold down the "Ctrl" and "F" button at the same time to make the "Find and Replace" window appear.
    d. Click on the "Replace" tab and leave the top "Find what" field completely empty, but then enter the LAST name of the generic provider that has been provided to you by HEALTHeLINK.
    e. Click on "Replace All"



    f. A new box will then appear stating how many replacements were made. Click "OK".
2. Column "P" = Dr. First
    a. Repeat all steps above but using the FIRST name of the generic provider that has been provided to you by HEALTHeLINK instead.
3. Column "Q" = NPI
    a. Click on the Letter "Q" to select the entire column (NPI)

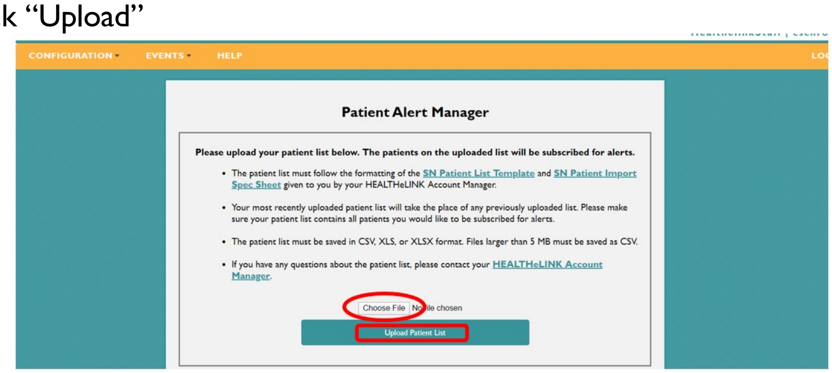
b. Once entire column is highlighted (less the Column Heading row), right click and select "Clear Contents"
c. This column should remain blank

Saving the Patient List Excel File

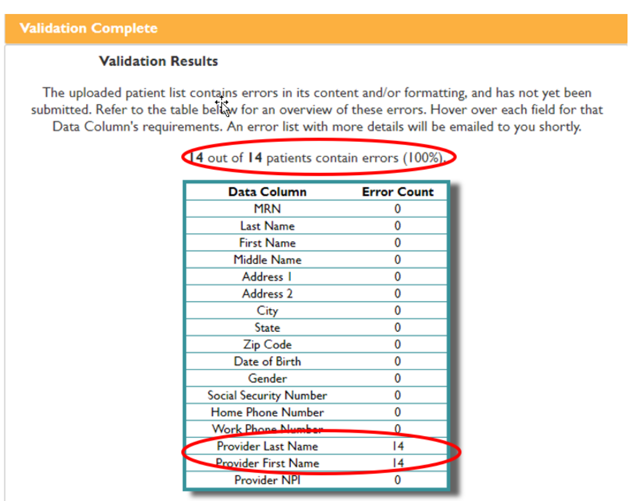
1. Click on "File" and then "Save As"
2. Change the file name. We recommend that you name the file something like "HEALTHeLINK February 2026"
3. Click on the "Save as Type" and change the format to "CSV (Comma delimited)(*csv)" file.
4. Save the file to your desktop for ease of locating the spreadsheet for upload.

Patient Alert Manager

1. Log-in to your HEALTHeCOMMUNITY dashboard, then click on Patient Alert Manager.
2. Click on "Choose File" and select the .csv file that you have just created and saved
3. Click "Upload"



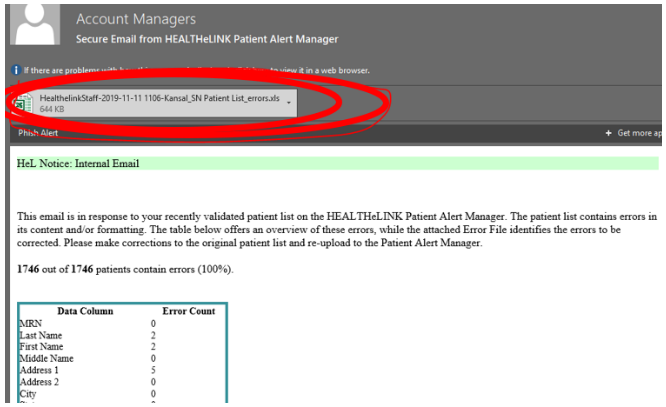
1. List is then validated. If there are errors, those error boxes will appear as below:
   a. You may continue to submit your list with known errors as long as any errors shown are minimal.
   b. By Submitting a report with known errors, you will be able to then identify the exact errors to be corrected via the automated Error Report that will be sent to your work email address directly after your upload has been submitted.



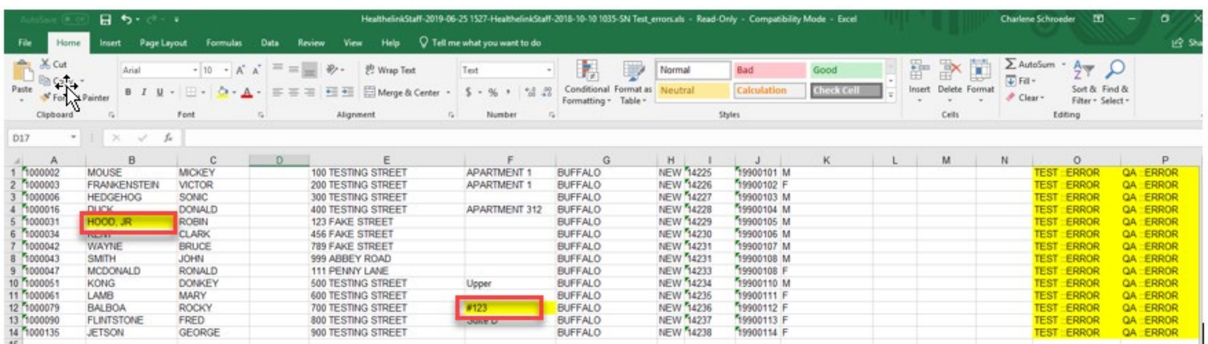
2. Click "Submit"

Error Report

An email will be sent to your work email address directly after your patient upload via an encrypted message. The email will include an attachment which will be your "Error Report".



When clicking on the attachment, an excel file will open that will be used to help you identify any errors that occurred during your patient list upload.



1. All errors will be highlighted in yellow to identify the exact field that needs to be corrected in the patient file inside of your EMR.
2. Errors must be fixed in your EMR system first, and then a new patient list file can be uploaded at the time of your next month's patient list upload.
    a. Error Example: On the image above in row 5 - column B, the field lists "Hood ,JR". When referring to the SPEC sheet on page 10 of this guide, you will see that special characters of any kind (Including commas in the name) will not be accepted and will cause that patient to error.
    b. Error Example: On the image above in row 12 – column F, the field lists "#123". Just as the example before, special characters of any kind will not be accepted and will cause that patient to error.
3. In both examples above, you would need to go to that patient's chart inside of your EMR, and remove the special character. Once the corrections have been made, please re-upload your corrected patient list and the corrections will be updated, and the patients will be successfully subscribed.

4. <u>**NEVER correct the error file and upload just the errors**</u>, as this would replace the entire list of subscribed patients with only the patients you corrected. (A complete patient list must be resubmitted after errors are corrected in order to subscribe to ALL patients on your list)

Subscribe and Notify Audit Report

HEALTHeLINK will run monthly audits based on the list your practice/organizations uploads to identify the current consent values for your patients as it applies to your practice/organization. This will be sent to your practice's Audit Recipient via their HEALTHeLINK MAXMD (Secure Messaging Account).

Troubleshooting

Subscribe and Notify Tips and Reminders

1. **It is imperative that you upload a new patient list once a month so that your patient roster can be kept accurate and up to date.**
2. It is the responsibility of the practice to unsubscribe patients with whom a treating relationship has been terminated.
3. Every time that you upload your patient list, it will replace the previous list on file.
4. You will only receive alerts on patients who have a "Yes" or "Unknown" consent value. (Refer to the monthly Subscribe and Notify Audit Report) that is sent by HEALTHeLINK.

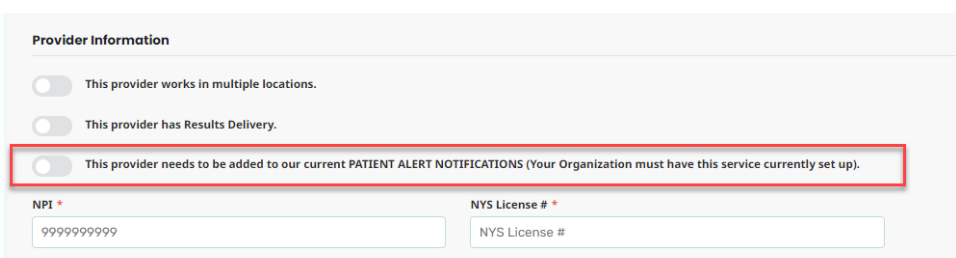
Frequently Asked Questions

Q. How do I add or remove a patient from my subscription?

A. When a patient has been added or deleted from your list, please upload a new patient list. (The update will not occur until this has been completed).

Q. How do I add a new provider to my subscription?

A. If you are adding a subscription for a real provider, the AC at your practice will need to submit a HEALTHeLINK user request for the provider via their AC Portal. When completing the request, under "Provider Information", you will need to toggle the option that says "This provider needs to be added to our current PATIENT ALERT NOTIFICATIONS"



If you need to add a subscription for a generic provider, please reach out to your Account Manager and they will be able to assist you.

Q. How do I remove a provider from my subscription?

A. Any time there has been a change to your providers, you will be responsible for reaching out to your Account Manager and letting them know when the provider's last date of service will be. This will ensure that the provider will be removed from your practice and that you will not continue to receive alerts for patients that are no longer yours.

Q. How do I change the Audit or Alert Recipient?

A. Please contact your Account Manager any time that a role change is required. Your Account Manager will be able to assist you with making these updates. Please also make sure that the new recipient is setup with the required MaxMD Secure Messaging account.

Q. How often should I upload my patient list?

A. Please upload your patient list monthly. If you have made any corrections inside your EMR based on the Error report following your upload, please re-upload your corrected patient list and the corrections will be updated, and the patients will be successfully subscribed.

Q. Why can't I upload my patient list?

A. If you are receiving a significant amount of errors when attempting to upload your patient list:

1. Ensure that the Excel file has been saved as a .csv file format.
2. Refer to the "SPEC Sheet" to make sure the data is listed correctly
3. If Provider NPI is highlighted on error report, please refer to "How do I add a provider to my subscription" above.
4. If you have confirmed ALL of the above, please reach out to the 24/7 HEALTHeLINK Help Desk for further troubleshooting.

Q. Why am I missing alerts?

A. There are a few different reasons why alerts may be missing:

1. Confirm that the patient has successfully been subscribed via your last patient upload. (This can be done by looking at the previous month's patient list that you uploaded to confirm the patient is listed).
2. Confirm that the patient did not appear on the most recent Error Report that was received directly after your last patient list upload. *Reminder – You will not receive alerts for any of your patients that are listed on this error report until you have corrected the error inside of your EMR and uploaded a new and complete list.
3. Confirm that the patient did not appear on your most recent Subscribe and Notify Audit Report showing as a "No" or "Unknown" consent value.
4. If you have confirmed ALL of the above, please gather the following information and report the missing alert to the 24/7 HEALTHeLINK Help Desk
   a. Patient Name
   b. Date Of Birth
   c. Data Source of Alert
   d. Date of Encounter
   e. Provider Name

Help and Support

For more information or training, please call HEALTHeLINK/HEALTHeNET 24/7 Help Desk Support at 877-895-4724 or 716-842-6343 or email support@wnyhealthelink.com.

Additional training materials are also available on our HEALTHeLINK website https://wnyhealthelink.com/for-providers/training-materials/