AC PORTAL TRAINING GUIDE

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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, resetting passwords, and much more.

As an AC, you are responsible for maintaining an accurate user list. 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. **You are responsible for maintaining who has access to this information by (at a minimum):**

- Verifying the practice list every 30 days. *If you have not verified the practice user list in 30 days, you will be unable to create any new users until you review and approve the practice user list*.
- Deactivating users who have left your practice *within 24 hours of termination*.

If you are an AC that manages users at multiple practices, you are now able to manage all users within one badge.

Logging into the AC Portal

1. Login to the HEALTHeCOMMUNITY Portal (www.wnylink.com) with your login credentials.


HEALTHeCOMMUNITY™ PORTAL
Welcome to the HEALTHeCOMMUNITY™ PORTAL
Please Login.
If you are experiencing issues logging in or have questions regarding this site, please call the Help Desk at 877-895-4724 or 716-842-6343 for assistance
User Name:
Password:
LOGIN
Forgot Password
HEALTHeLINK WEBSITE LINKS
1. HEALTHeLINK's listing of current Data Sources
2. HEALTHeLINK Policy video
3. HEALTHeLINK Training Videos
BASIC TROUBLESHOOTING
1. If you are experiencing issues with pop-up blockers on this portal, please click here for more information on allowing pop-ups. The symptom for this issue is after logging into the Portal and selecting an application, after about 10 seconds your page returns to the page where you originally selected the application.
2. If you are receiving a message that an application is not compatible with the browser you are using, please download the following Word document about Compatibility View Settings.
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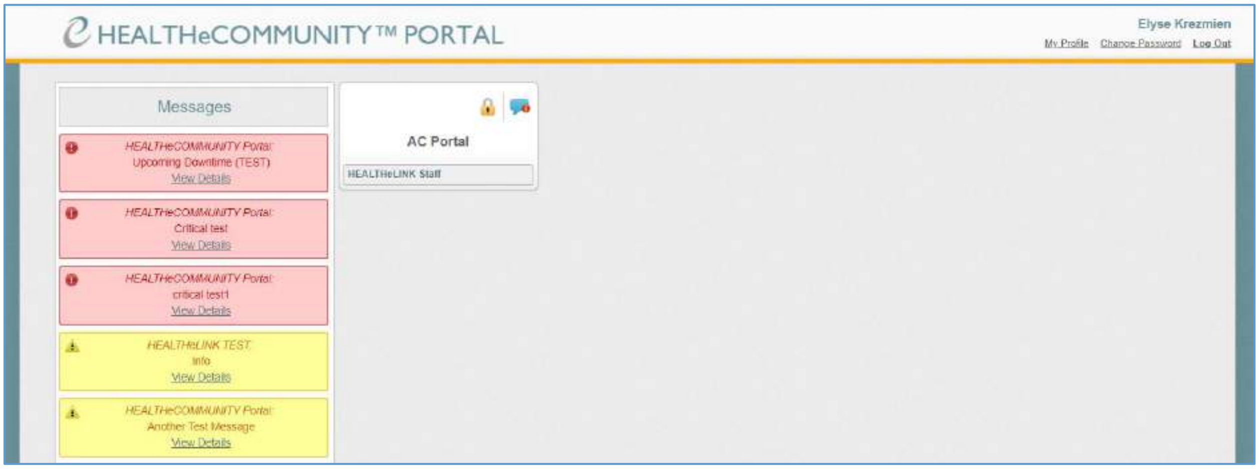
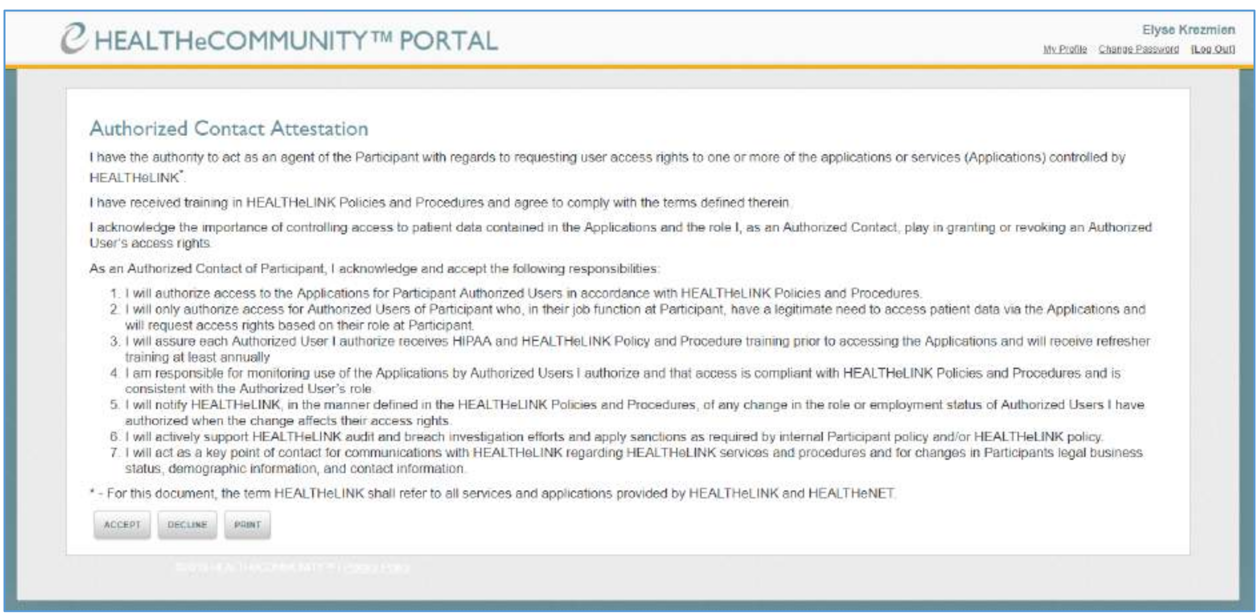
2. Select the AC Portal badge. NOTE: If you are an AC at multiple practices, you will not see a practice name on the badge.



3. DUO Authentication
    a. If you have already registered with DUO, proceed to the next step.
    b. 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).
4. Read and complete the attestation. NOTE: You cannot enter the AC Portal without clicking [ACCEPT].



User Management

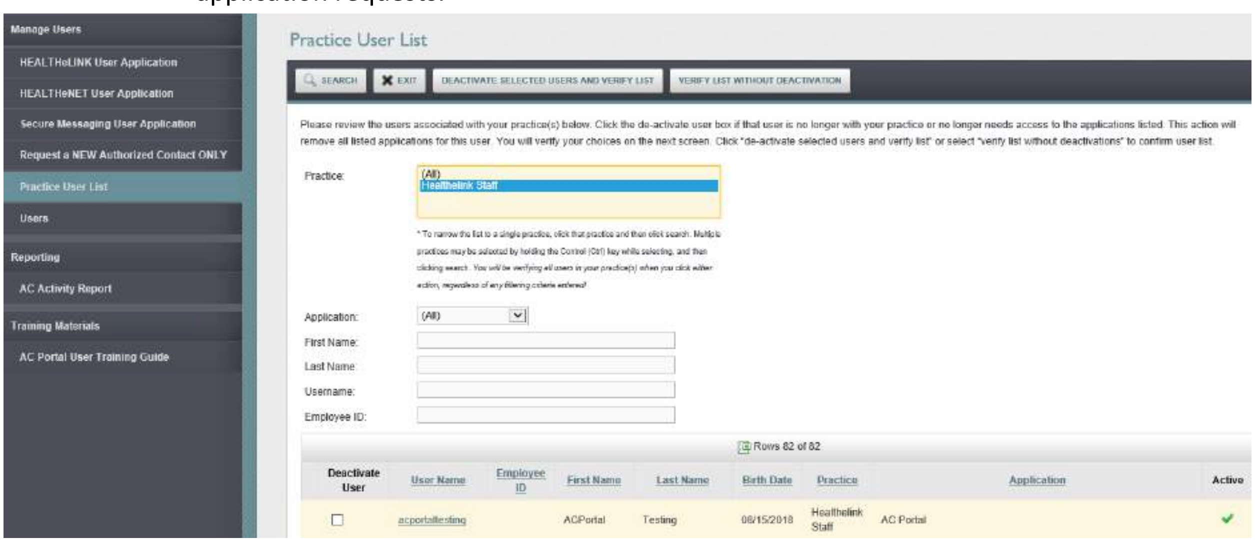
Practice User List

When you login to the AC Portal, the landing page is the Practice User List. The Practice User List displays all active users you are responsible for maintaining, including their username, name, practice associations, applications, and AC status.

Filtering and Searching the Practice User List

By default, the Practice User List displays all users across all practices and all applications you have permissions to manage. You can adjust the results by using the fields provided and clicking [SEARCH]:

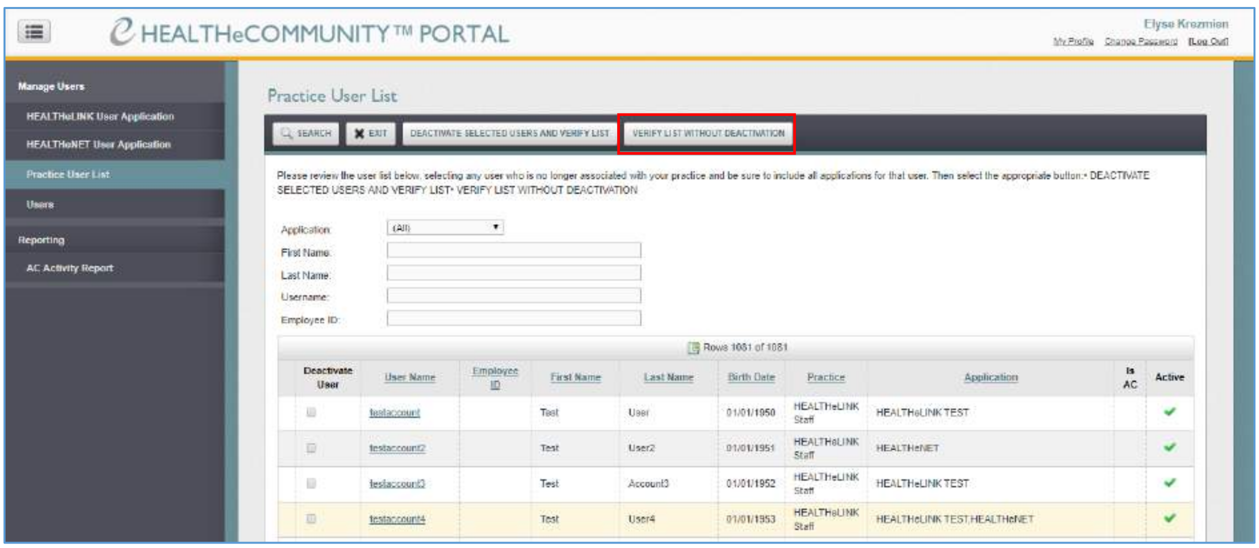
- Application
    - NOTE: You can only filter by applications that you have permissions to manage.
- First Name
- Last Name
- Username
- Employee ID
    - NOTE: This field is only relevant to users who submit internal employee IDs with their application requests.



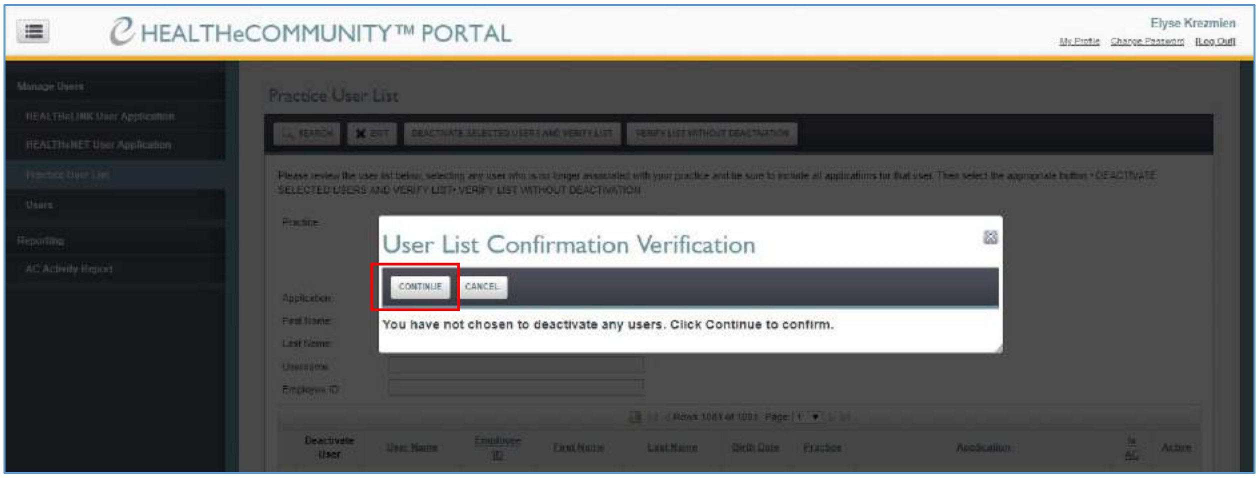
If you manage multiple practices, you have an additional search option: Practice. You can select all, one, or multiple practices using the Practice field. To select multiple practices, click “practices” while holding down the [Ctrl] button on your keyboard.

Verifying the Practice User List without User Deactivation

1. Click “Practice User List” option on the left menu. NOTE: This page is also the default page when you log into the AC Portal.
2. Review the user list. All users on the Practice User List are active.
    a. If you are the AC for multiple practices, you must review the user list for each practice. To view all users at the same time, select “All” under the Practice search option.
3. If *absolutely all* users in the list are accurate, click [VERIFY LIST WITHOUT DEACTIVATION].



4. Click [CONTINUE] on the confirmation pop-up to complete verification of the practice list.

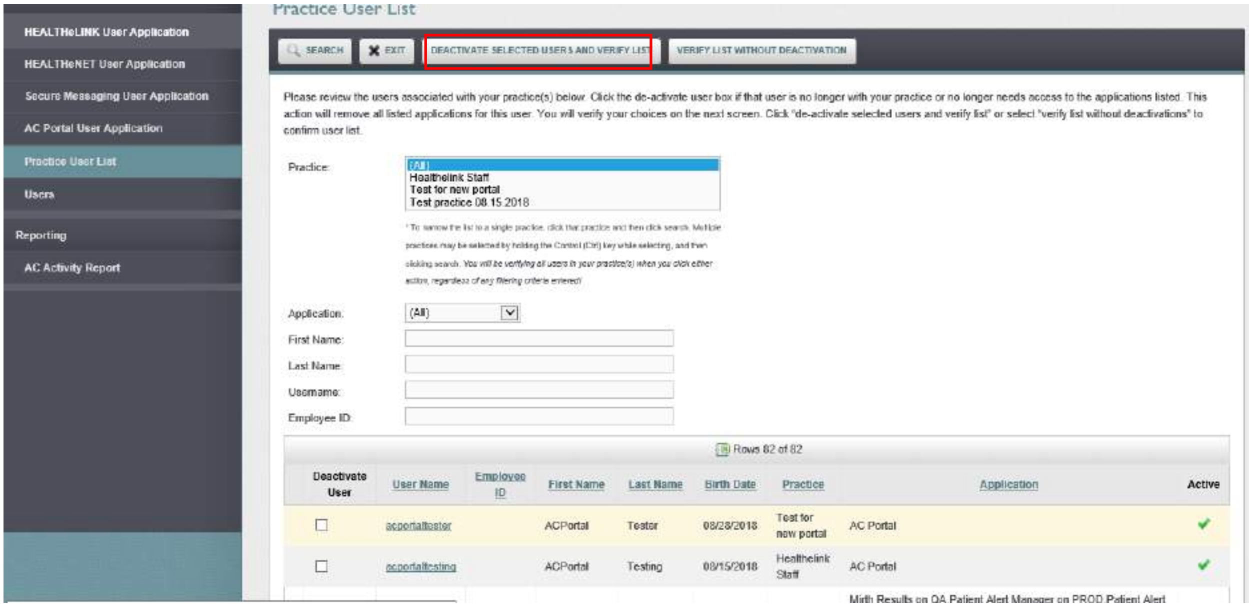


5. Repeat steps 1-4 for all practices where you are the AC.
6. If users in the list must be deactivated, see Verifying the Practice User List with User Deactivation section of this document instead.

NOTE: You are required to review user list(s) every 30 days. If you do not review your user list(s), you will be blocked from requesting any HEALTHeLINK or HEALTHeNET users until reviews are completed.

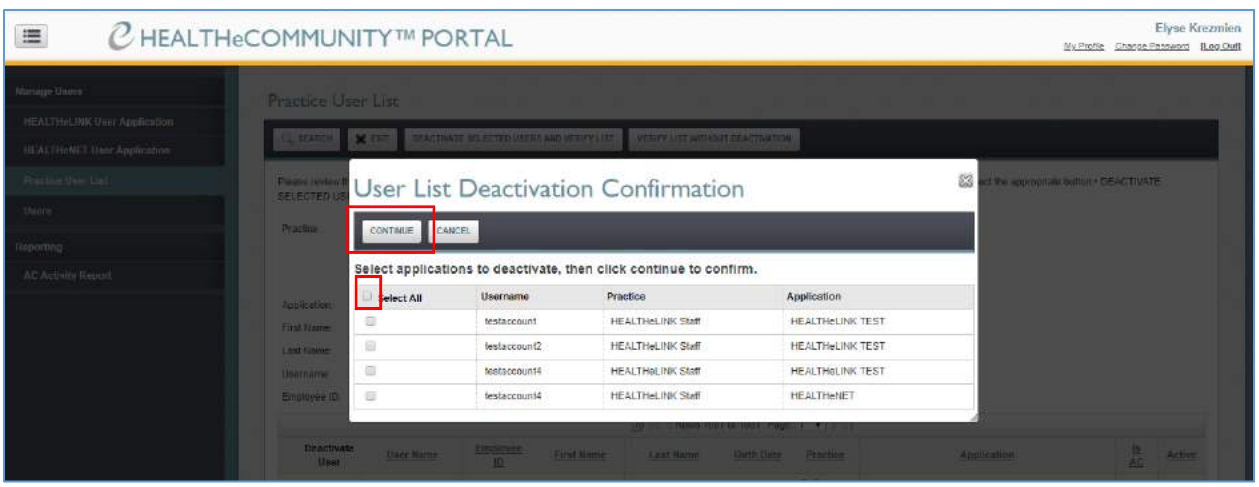
Verifying the Practice User List with User Deactivation

1. Click "Practice User List" option on the left menu. NOTE: This page is also the default page when you log into the AC Portal.
2. Review the user list. All users on the practice user list are active.
    a. If you are the AC for multiple practices, you must review the user list for each practice. To view all users at the same time, select "All" under the Practice search option.
3. If *absolutely all* users in the list are accurate, see Verifying the Practice User List without User Deactivation section of this document.
4. If users in the list must be deactivated:
    a. Select users using the checkbox in the "Deactivate User" column.
    b. Click [DEACTIVATE SELECTED USERS AND VERIFY LIST].



c. The pop-up that displays, will list the users selected in step 4a with each application for the user listed as a separate line.

d. ALL APPLICATIONS FOR THE USER WILL BE DEACTIVATED.



e. Click [CONTINUE].

5. Repeat steps 1-4 for all practices where you are the AC.

NOTE: You are required to deactivate users within 24 hours of termination.

Users Page and Updating User Records

As an AC, you can conduct the following actions on a user's account:

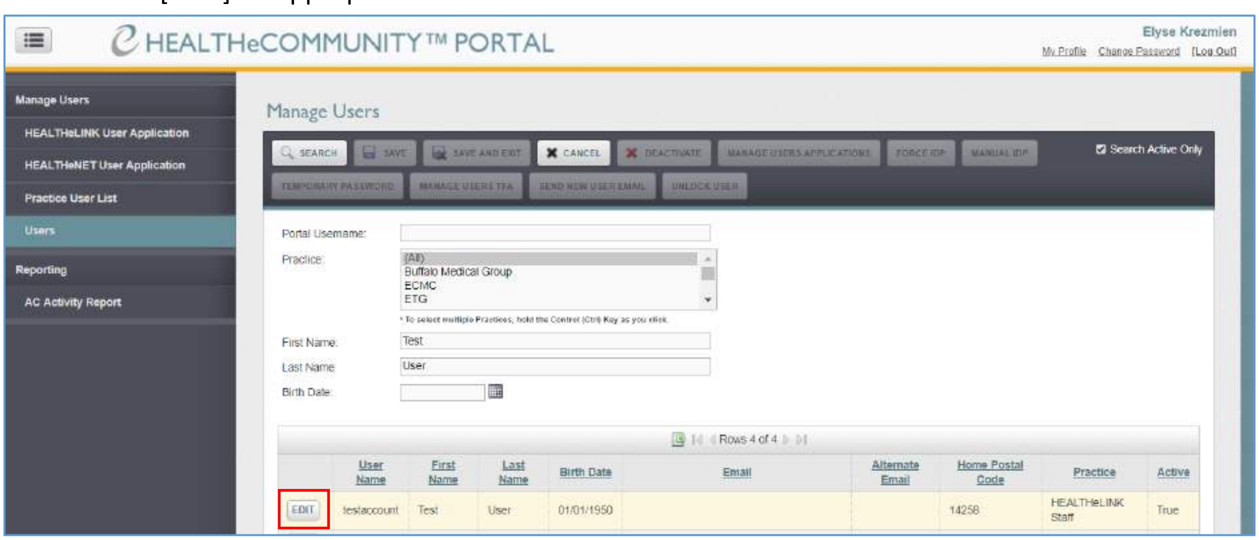
- Reset password and issue a temporary password
- Manually identity proof (IDP) a user who has failed IDP
- Update a work email
- Send a new user email
- Unlock a locked user
- Force a user through IDP

Additionally, you can use search features on the Users page to pull up lists of active and deactivated users.

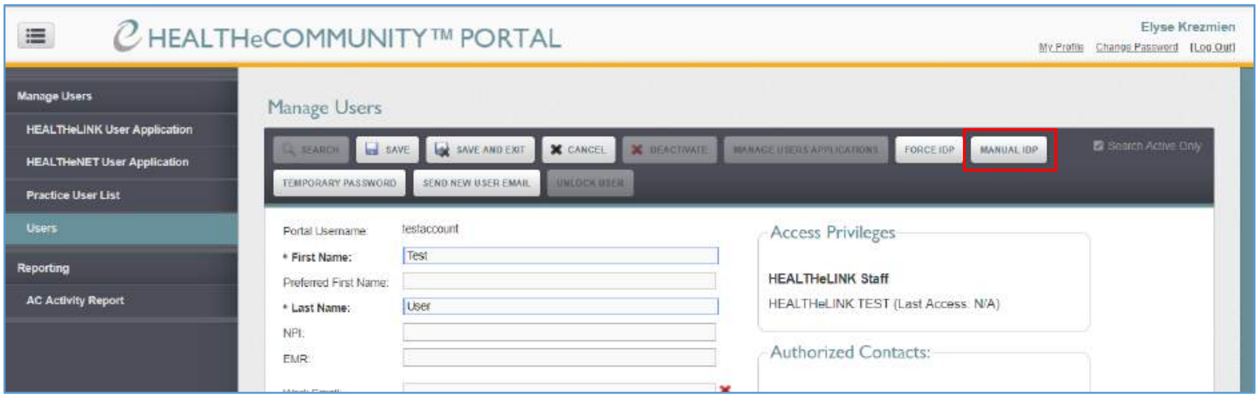
Manual IDP (Identify Proofing)

If a user fails identify proofing during new account set up, you can manually verify their identity in the AC Portal following the steps below:

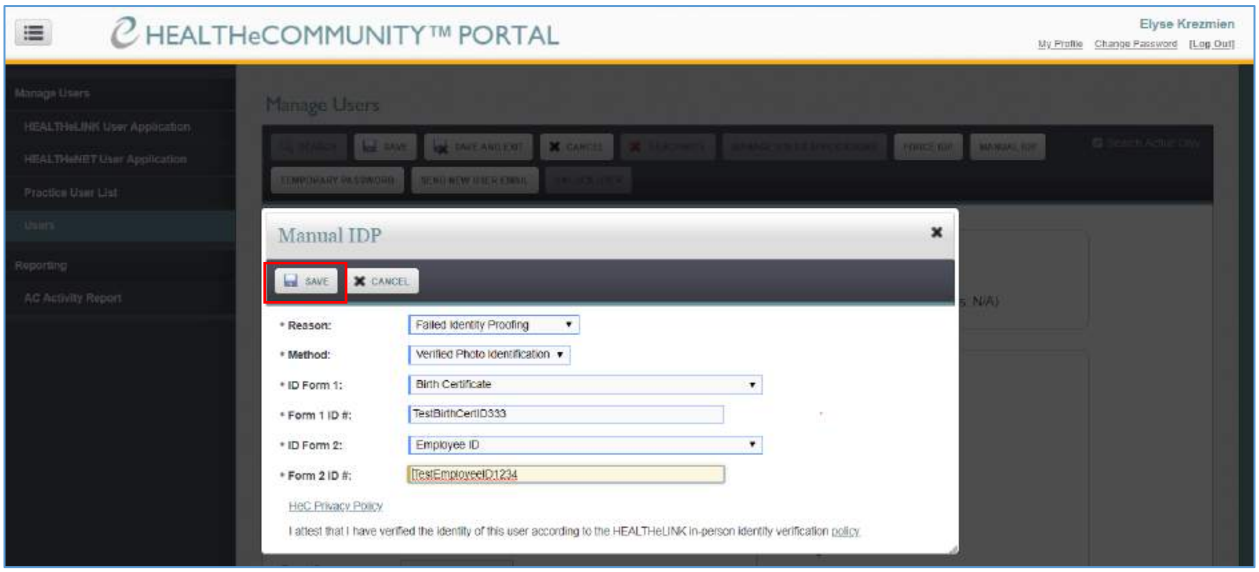
1. Select 'Users" option on the left menu.
2. Enter user information in search fields.
3. Click [SEARCH].
4. Click [EDIT] on appropriate user record.



5. Click [Manual IDP].



6. Fill in the pop-up form with the identification details you used to confirm the user's identity.
7. Click [SAVE].

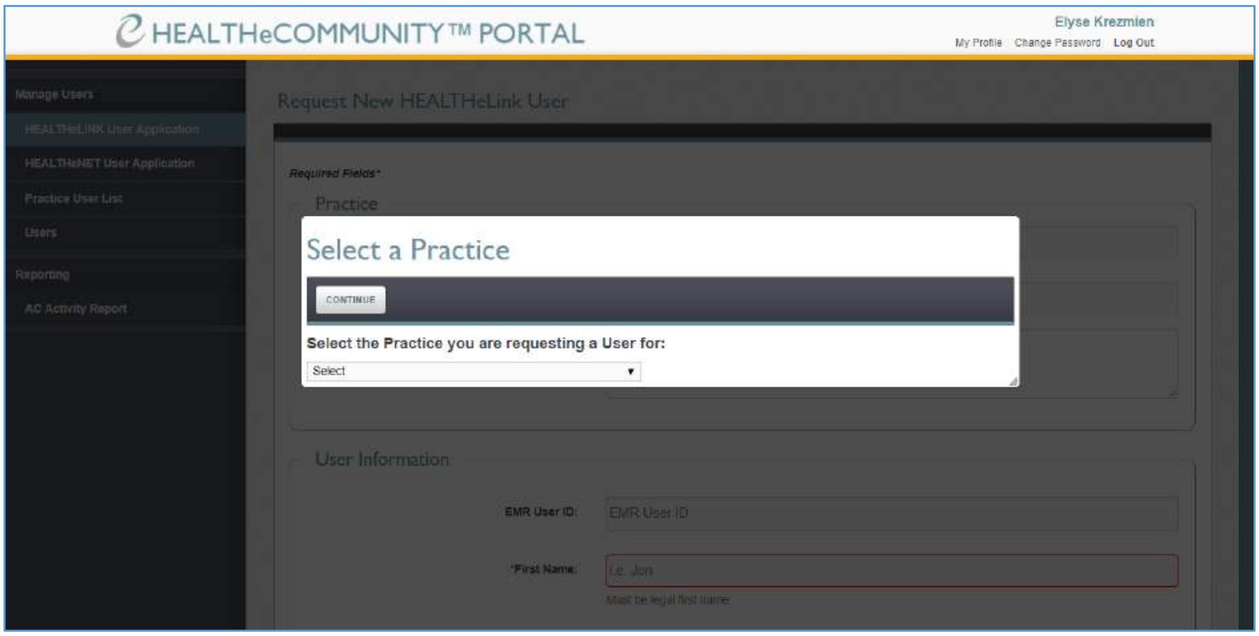


Requesting a New User Account

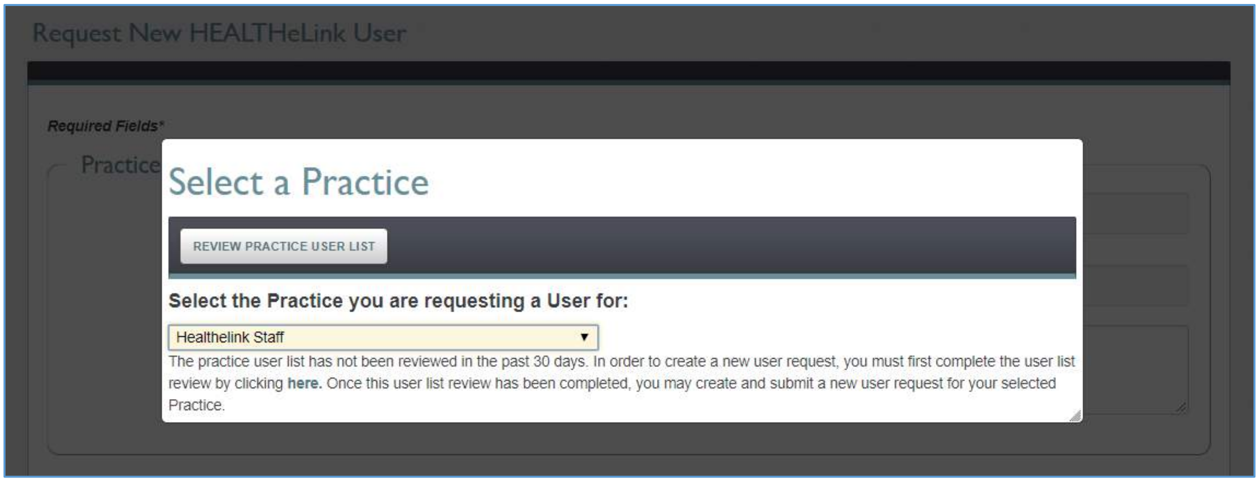
HEALTHeLINK User Application

Follow the steps below to request a new user account for HEALTHeLINK.

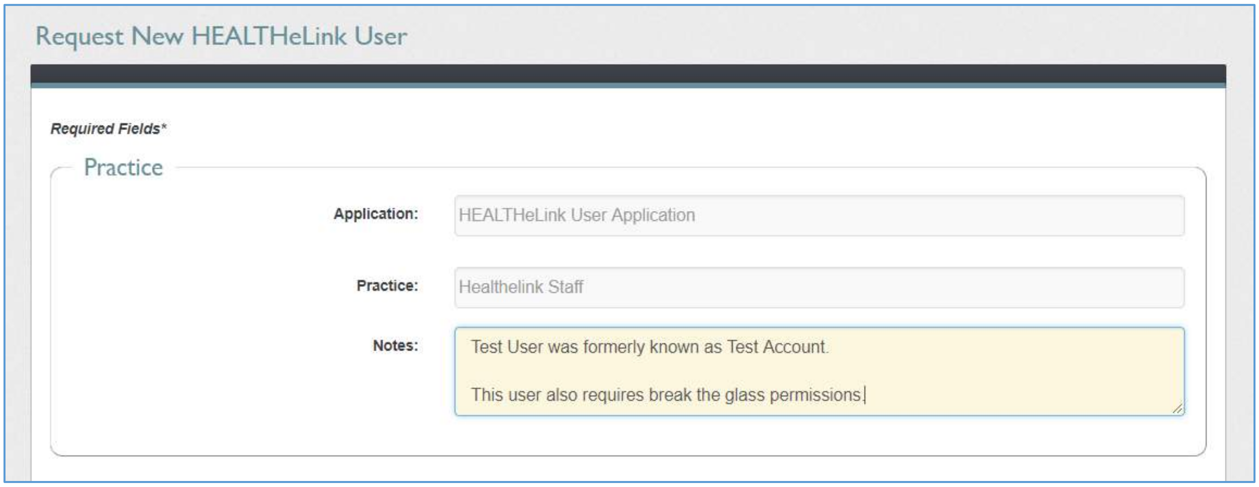
1. Select “HEALTHeLINK User Application” option on the left menu to set up users for your Practice.
    a. If you are an AC at multiple practices, you must select the practice for the new user prior to filling out the application.



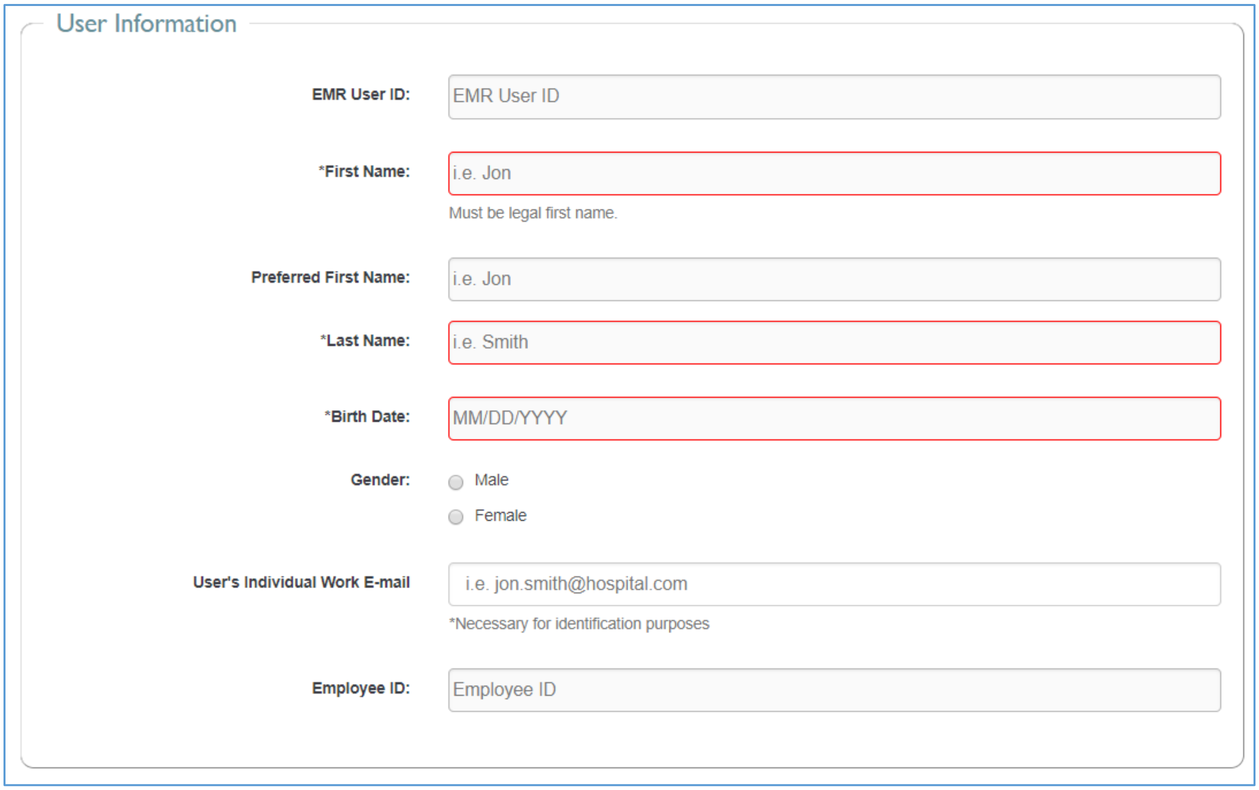
    b. If you have not reviewed your practice list in 30 days, you will be blocked from submitting an application. Click [REVIEW PRACTICE USER LIST] to go to the Practice User List page to verify the practice user list.


Request New HEALTHeLink User
Required Fields*
Practice
Select a Practice
REVIEW PRACTICE USER LIST
Select the Practice you are requesting a User for:
Healthelink Staff
The practice user list has not been reviewed in the past 30 days. In order to create a new user request, you must first complete the user list review by clicking here. Once this user list review has been completed, you may create and submit a new user request for your selected Practice.

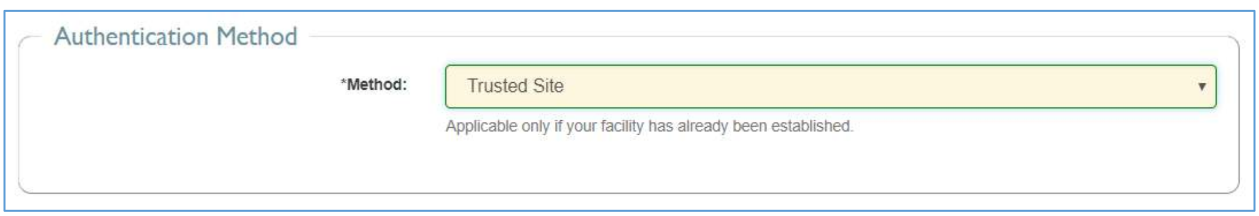
2. The Application, Practice, and Organization Name fields are pre-filled and uneditable based on practice selection. Complete the Notes field, if applicable. Use the Notes field to include items such as:
    a. HIE worklist (Transfer to PACs) requests
    b. Parental Consent Override (PCO) requests
    c. Break the Glass requests
    d. Secure Messaging requests
    e. Prior name and username information (in case of name change)



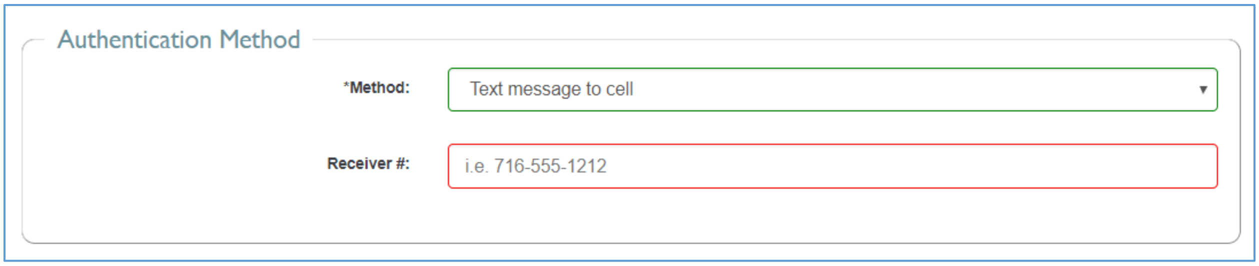
3. Enter user information. The minimum required fields are indicated by an asterisk and are also outlined in red.



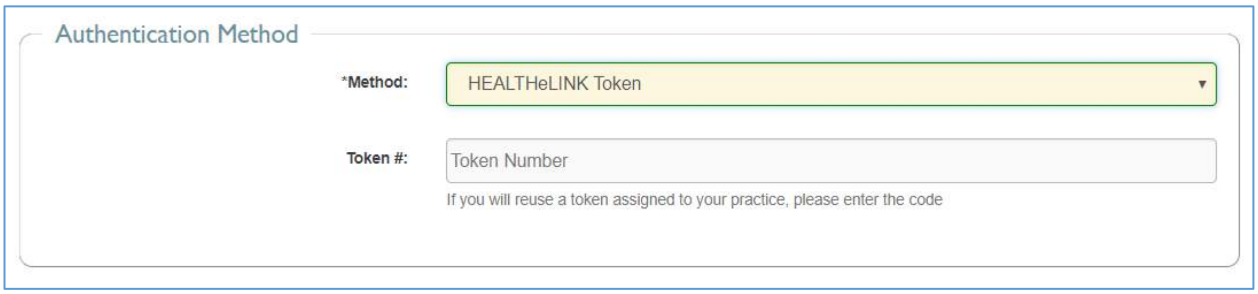
4. Select the Authentication Method from the drop down.
    a. If you are a trusted site of HEALTHeLINK, select “Trusted Site” from dropdown.



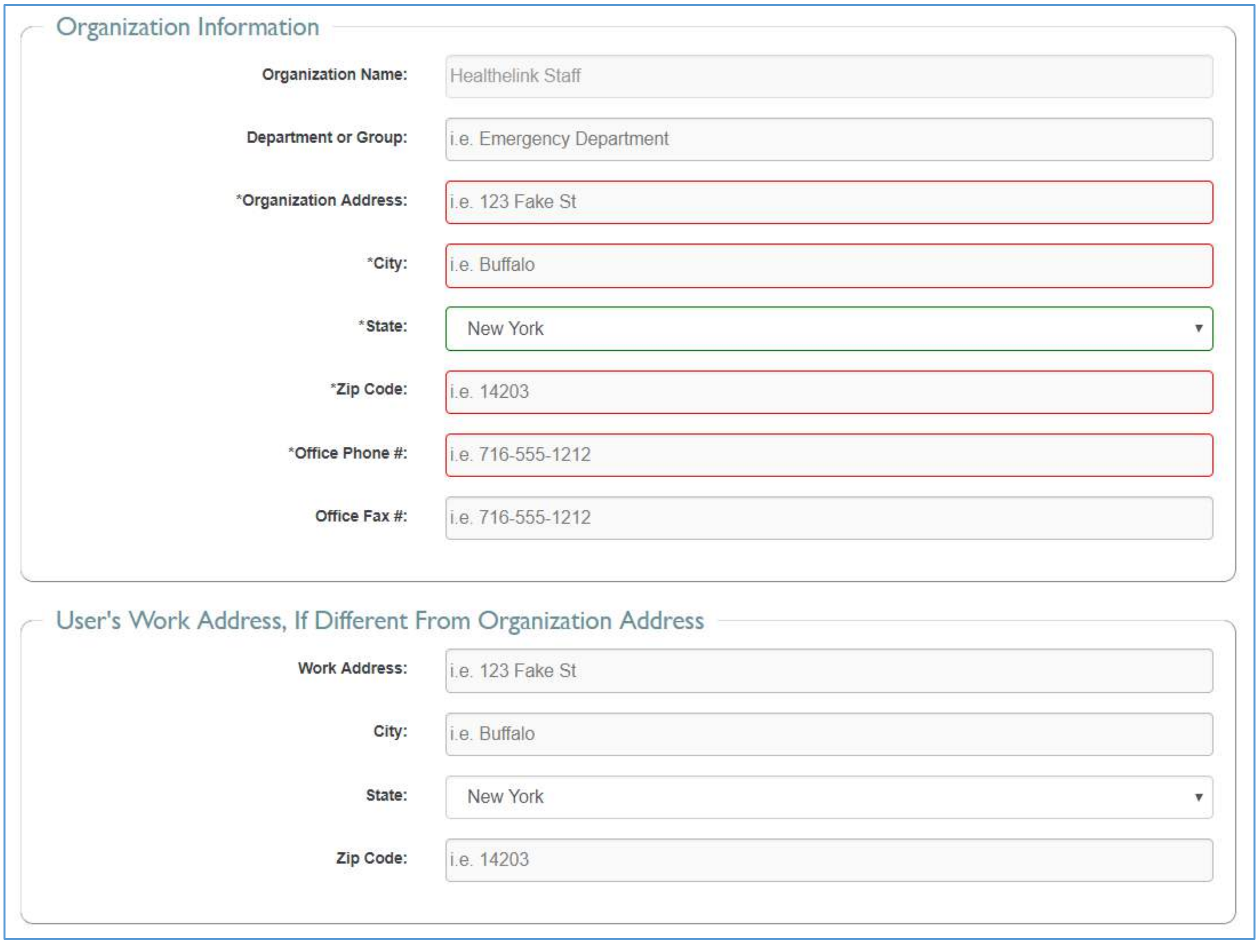
    b. If selecting “Text message to cell”, “Voice call to cell”, or “Voice call to landline”, you will have to enter the user’s phone number. This must be a personal phone line exclusive to the user.



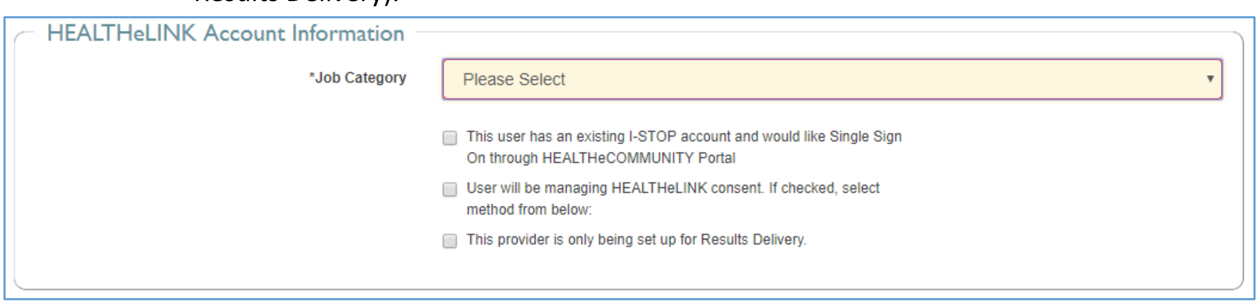
c. If selecting HEALTHeLINK Token, you have the option to enter a token #. If you have unused tokens at your practice, enter this in the Token # field.



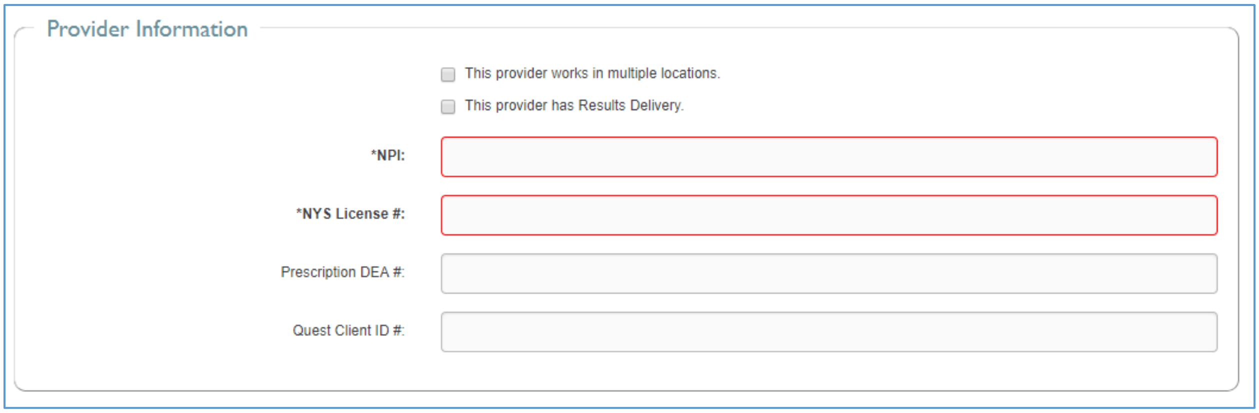
5. Enter organization information and user's work address. The minimum required fields are indicated by an asterisk and outlined in red.



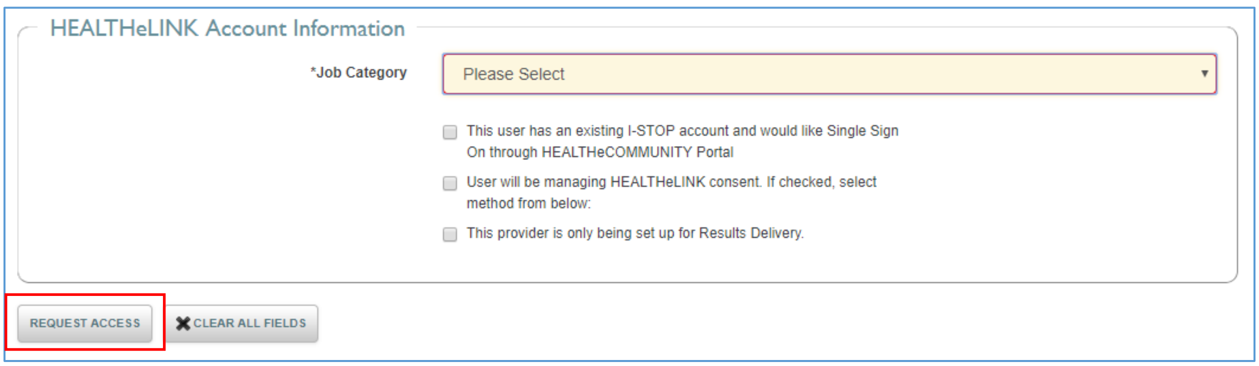
6. Select the appropriate job category from the dropdown menu. NOTE: Selecting "Non Clinical" prevents the user from seeing patient results.
    a. Select appropriate checkboxes for additional access (I-STOP, HEALTHeLINK consent, Results Delivery).



b. If you selected "MD/DO/Fellow" or "PA/NP" from the job category, you must complete the Provider Information section.



7. Click [REQUEST ACCESS].



8. You will receive an email once the application has been processed.

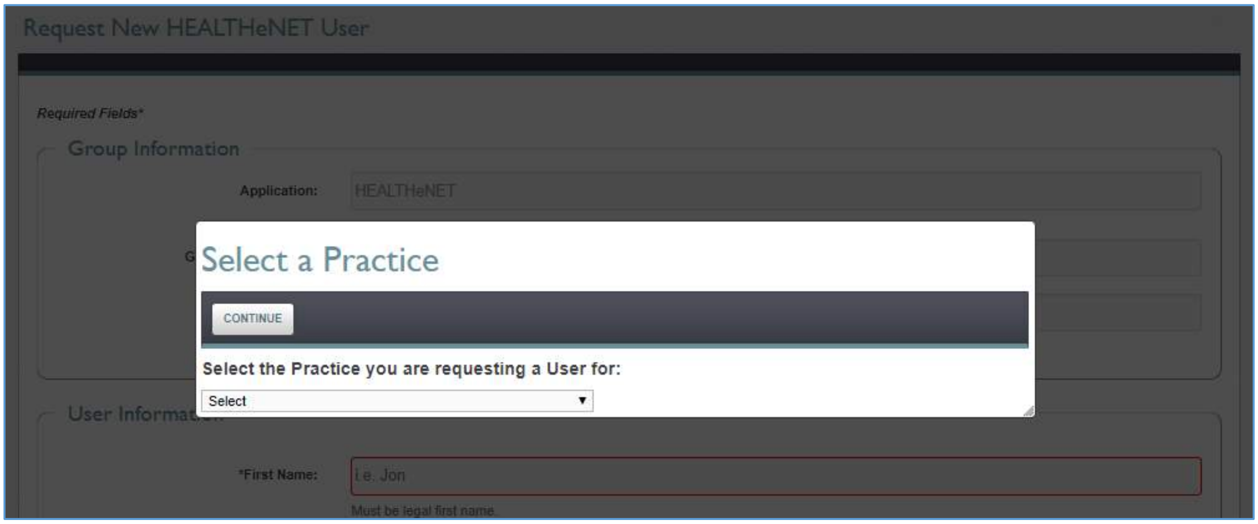
When the account is processed, the user will receive an email from noreply@wnyhealthelink.com. The email will contain a link to the HEALTHeCOMMUNITY Portal to complete their account setup**. <u>The link will expire after seven days and can only be clicked once.</u>** If the link expires and the user needs a password reset, you can use the AC Portal to issue the user a temporary password.

NOTE: It could take up to five business days for HEALTHeLINK to process the user request.

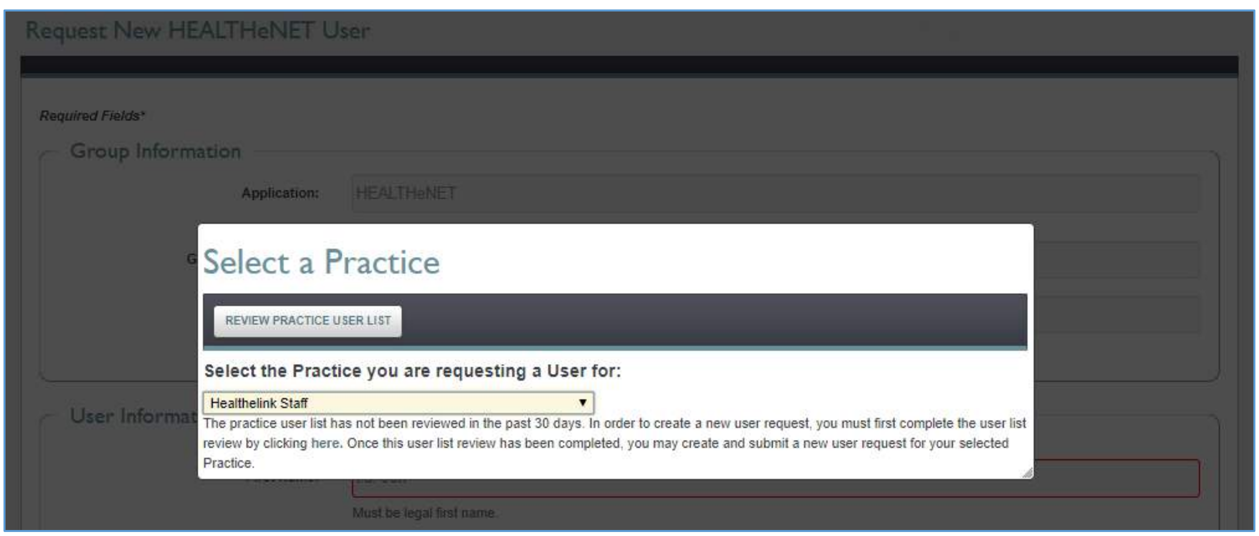
HEALTHeNET User Application

Follow the steps below to request a new user account for HEALTHeNET

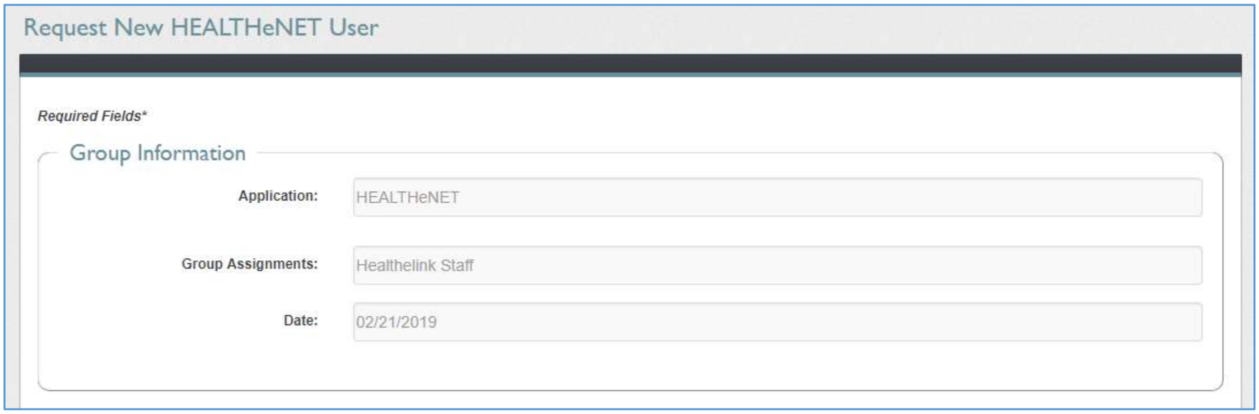
1. Select "HEALTHeNET User Application" option on the left menu.
    a. If you are an AC at multiple practices, you must select the practice for the new user prior to filling out the application.



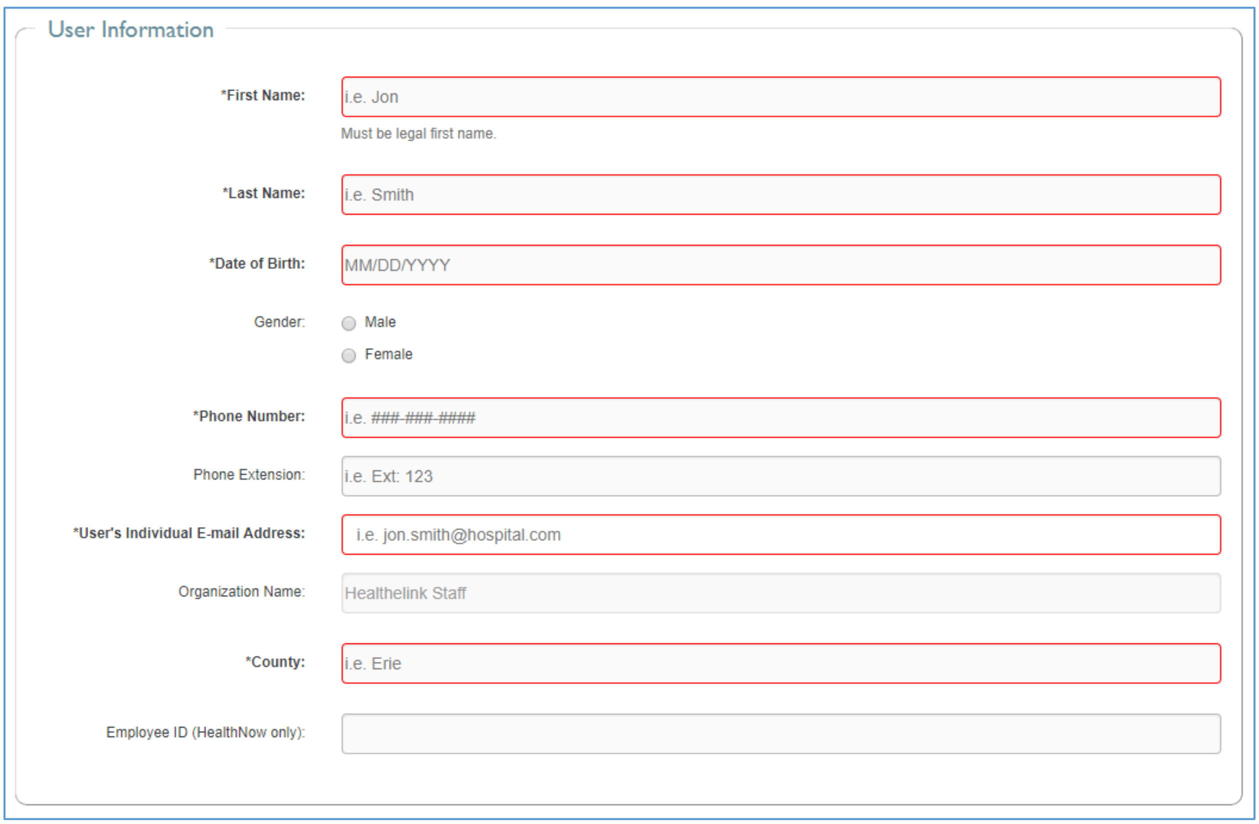
    b. If you have not reviewed your practice list in 30 days, you will be blocked from submitting an application. Click [REVIEW PRACTICE USER LIST] to go to the Practice User List landing page to verify the practice user list.



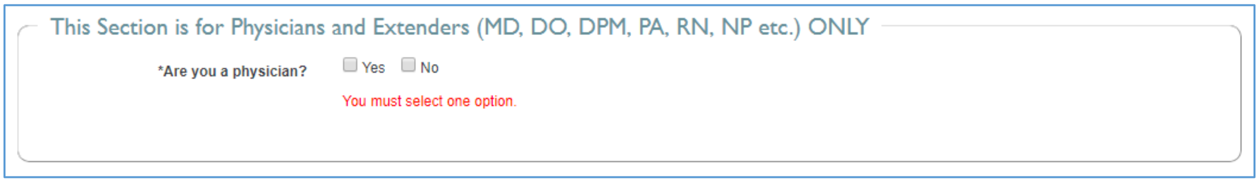
2. The Application, Group Assignments, and fields are pre-filled and uneditable based on practice selection.



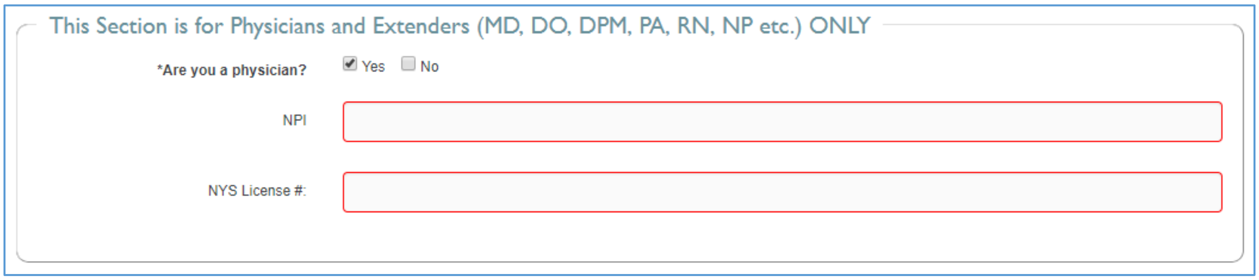
3. Enter user information. The minimum required fields are indicated by an asterisk and are outlined in red.



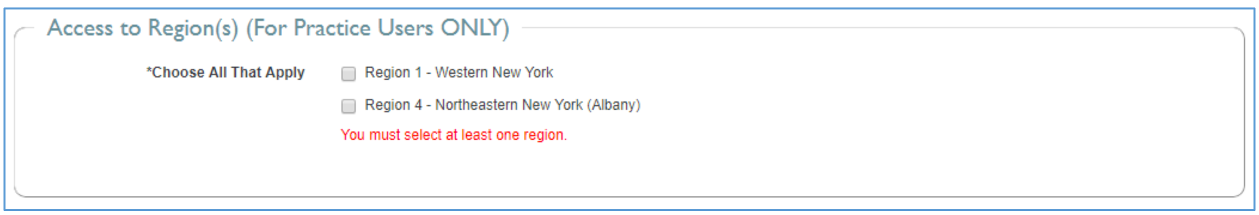
4. Indicate whether the user is a physician.



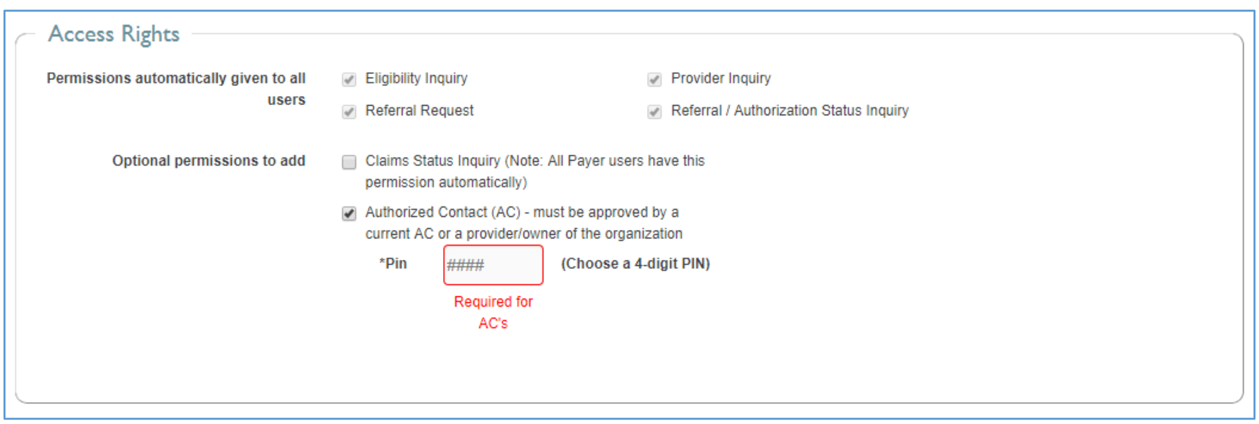
   a. If the user is a physician, you must provide the user's NPI and NYS License # in the appropriate fields.



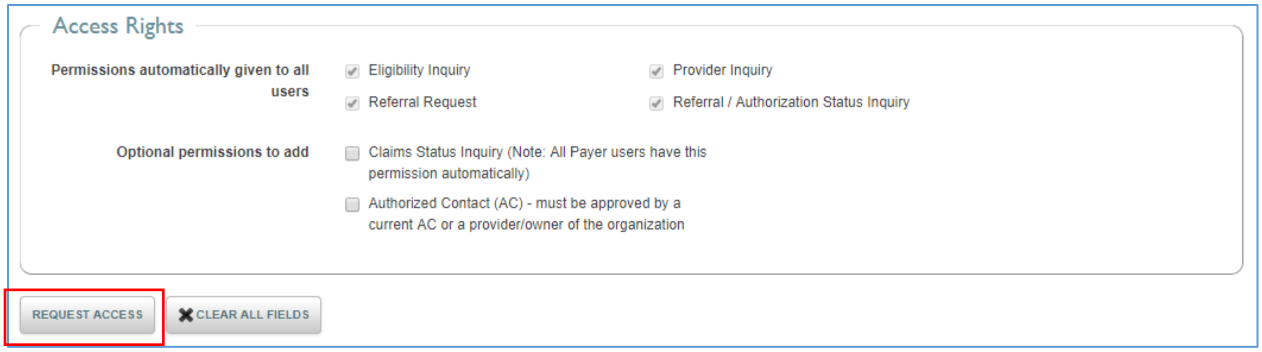
5. Select appropriate checkboxes for regions.



6. Select appropriate checkboxes for additional access (Claims Status Inquiry, Authorized Contact).
   a. If Authorized Contact is selected, you must provide the user's 4-digit pin number.



7. Click [REQUEST ACCESS].



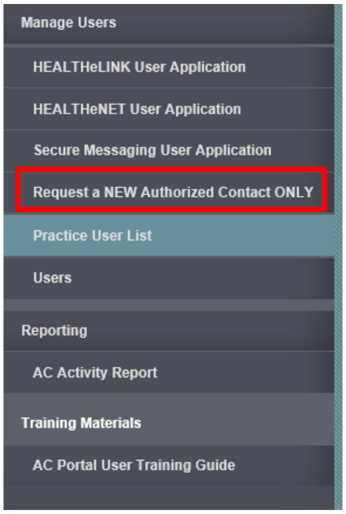
8. When the account is processed, the user will receive an email from noreply@wnyhealthelink.com. The email will contain a link to the HEALTHeCOMMUNITY Portal to complete their account setup. **<u>The link will expire after seven days and can only be clicked once.</u>** If the link expires and the user needs a password reset, you can use the AC Portal to issue the user a temporary password.

NOTE: It could take up to five business days for HEALTHeNET to process the user request.

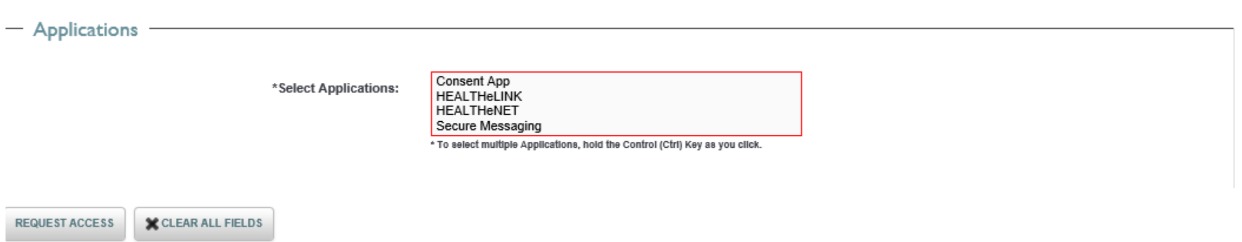
AC PORTAL User Application

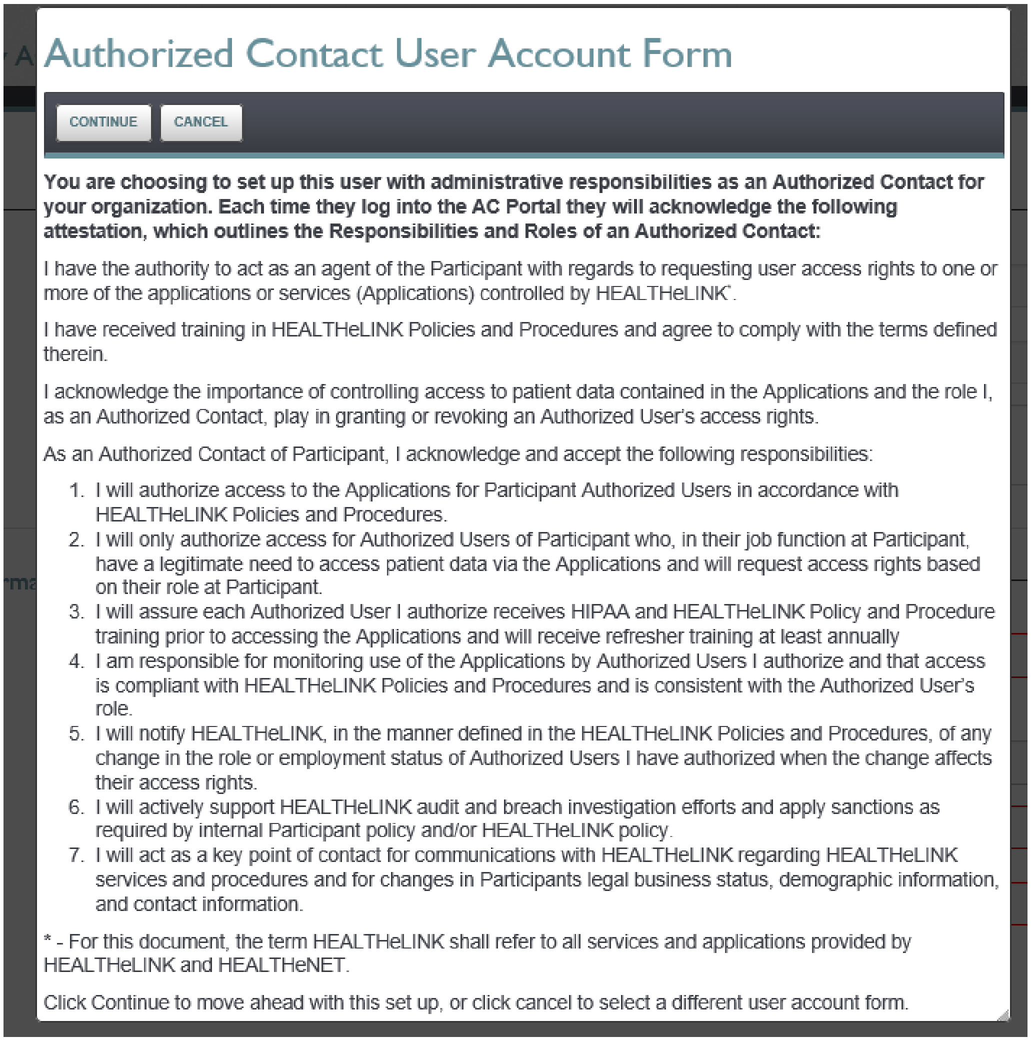
Follow the steps below to request a New Authorized Contact for your practice.

1. Select **REQUEST a NEW Authorized Contact ONLY** option on the left menu.
    a. If you are an AC at multiple practices, you must select the practice for the new AC prior to filling out the application.



    b. Once selected, a pop up **NEW AUTHORIZED CONTACT RESPONSIBILITIES ATTESTATION will need to be verified by you that you are setting up another AC for your Practice. Please review the Responsibilities with your new AC you are setting up.**
    c. The **NEW AC** will have access to set the Applications up for all users that you assign them to:





Authorized Contact User Account Form

CONTINUE CANCEL

You are choosing to set up this user with administrative responsibilities as an Authorized Contact for your organization. Each time they log into the AC Portal they will acknowledge the following attestation, which outlines the Responsibilities and Roles of an Authorized Contact:

I have the authority to act as an agent of the Participant with regards to requesting user access rights to one or more of the applications or services (Applications) controlled by HEALTHeLINK*.

I have received training in HEALTHeLINK Policies and Procedures and agree to comply with the terms defined therein.

I acknowledge the importance of controlling access to patient data contained in the Applications and the role I, as an Authorized Contact, play in granting or revoking an Authorized User's access rights.

As an Authorized Contact of Participant, I acknowledge and accept the following responsibilities:

1. I will authorize access to the Applications for Participant Authorized Users in accordance with HEALTHeLINK Policies and Procedures.
2. I will only authorize access for Authorized Users of Participant who, in their job function at Participant, have a legitimate need to access patient data via the Applications and will request access rights based on their role at Participant.
3. I will assure each Authorized User I authorize receives HIPAA and HEALTHeLINK Policy and Procedure training prior to accessing the Applications and will receive refresher training at least annually
4. I am responsible for monitoring use of the Applications by Authorized Users I authorize and that access is compliant with HEALTHeLINK Policies and Procedures and is consistent with the Authorized User's role.
5. I will notify HEALTHeLINK, in the manner defined in the HEALTHeLINK Policies and Procedures, of any change in the role or employment status of Authorized Users I have authorized when the change affects their access rights.
6. I will actively support HEALTHeLINK audit and breach investigation efforts and apply sanctions as required by internal Participant policy and/or HEALTHeLINK policy.
7. I will act as a key point of contact for communications with HEALTHeLINK regarding HEALTHeLINK services and procedures and for changes in Participants legal business status, demographic information, and contact information.

* - For this document, the term HEALTHeLINK shall refer to all services and applications provided by HEALTHeLINK and HEALTHeNET.

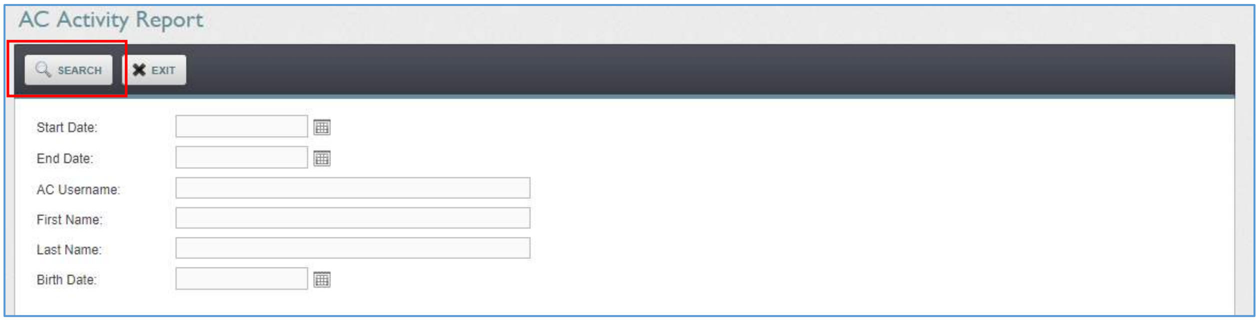
Click Continue to move ahead with this set up, or click cancel to select a different user account form.

PLEASE REVIEW THE RESPONSIBILITIES OF THE AUTHORIZED CONTACT WITH YOUR NEW AC YOU ARE SETTING UP.

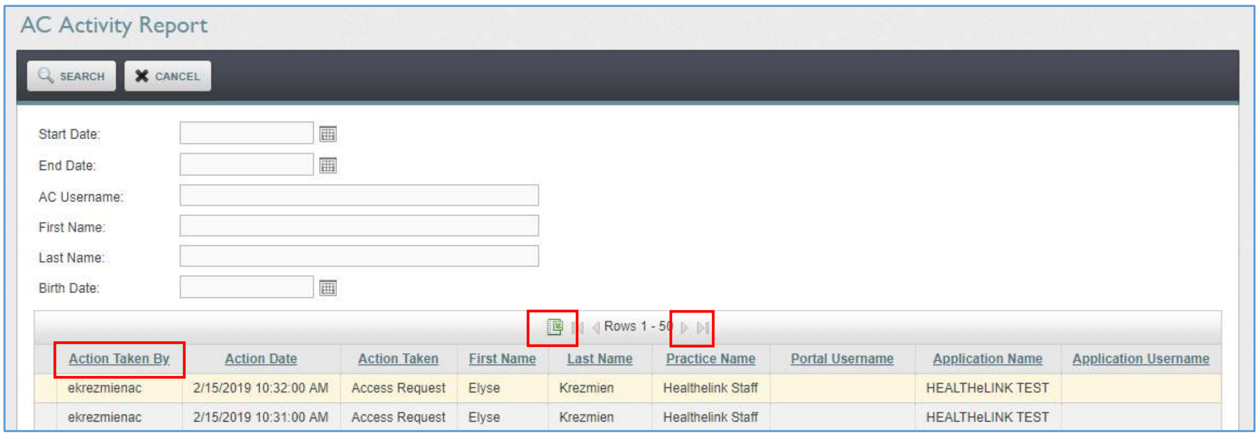
AC Activity Report

As an AC you have the ability to access an activity report to review what functions were performed in the AC Portal for your practice(s). This report will contain activity from all ACs if your practice has more than one.

1. Select “AC Activity Report” option on the left menu.
2. You can narrow down your search by entering criteria in the search fields or just click the [SEARCH] button.



3. If your report has multiple pages, you can use the arrows at the top of the list to skip to the next page or last page. You can sort the columns by clicking on the column headers or download the report by clicking on the Excel icon at the top of the list.



If you have any questions or need additional training, please contact HEALTHeLINK/HEALTHeNET Support at support@wnyhealthelink.com or 1-877-895-4724.