Authorized Contact (AC) Portal Training Guide

May 12, 2020

v2.0

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1. Overview

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.

2. Help and Support

For more information or training on the AC Portal, please contact the Help Desk.

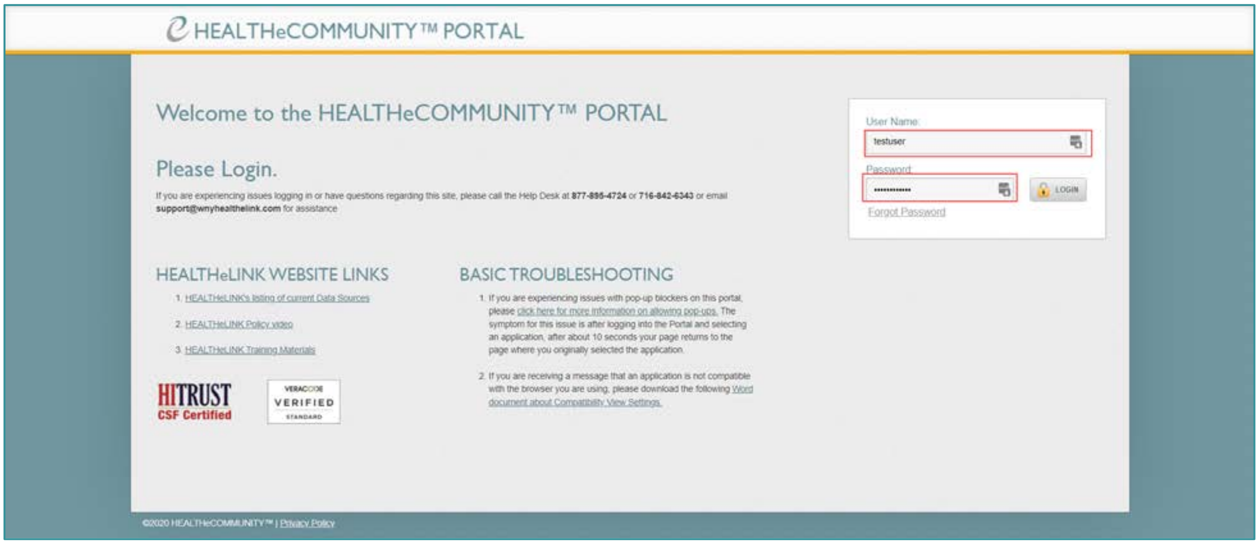
For HEALTHeLINK™ Support

24/7 Help Desk Support	**877.895.4724**
Local Help Desk Support	**716.842.6343**

Additional training materials are available at
www.wnyhealthelink.com/PhysiciansandStaff/TrainingVideos

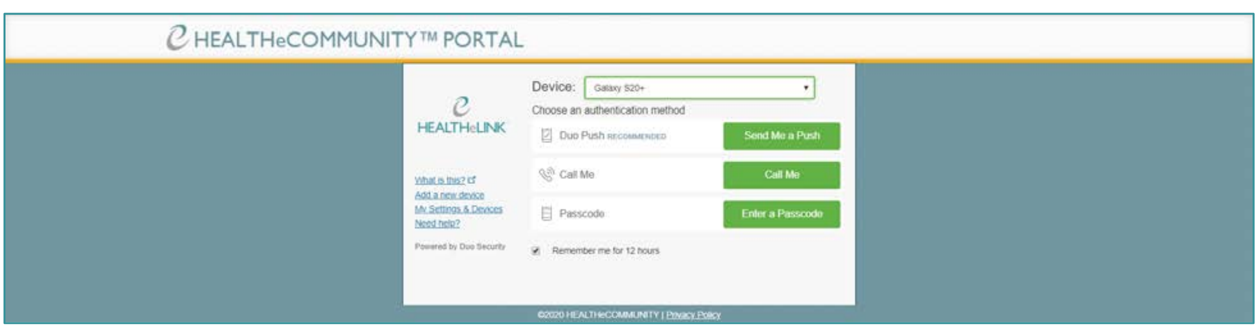
3. AC Portal Login

1. Login to [HEALTHeCOMMUNITY Portal]() with your credentials

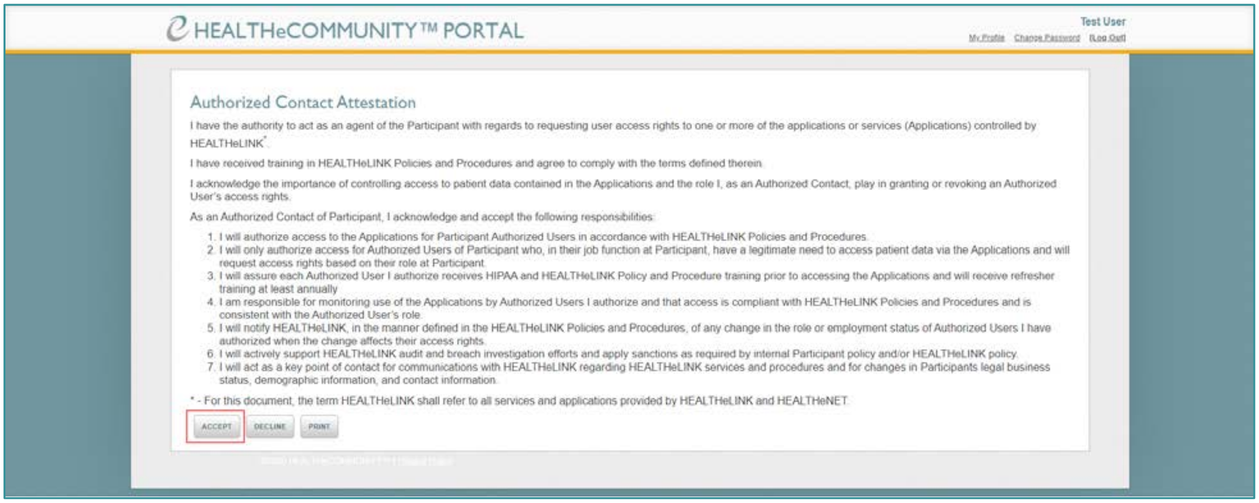


2. Select the AC Portal badge
   a. If you are an AC at multiple practices, you will not see a practice name on the badge

3. Go through two-factor authentication (TFA)
   a. If you have already registered with Duo, simply authenticate using your pre-registered device
   b. If you need to set up Duo TFA, please refer to the [Duo Security (TFA) Implementation Guide]()



4. Read and accept the attestation by clicking [ACCEPT]. You cannot enter the AC Portal without accepting the attestation.



4. User Management

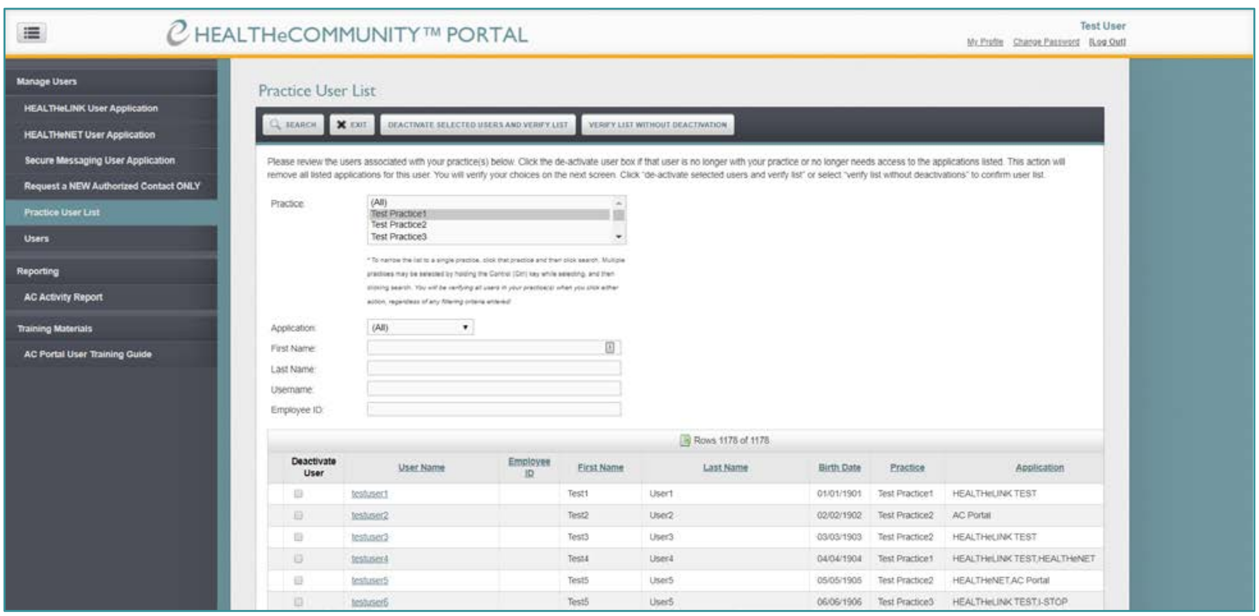
4.1. Practice User List

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.

4.1.1. 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

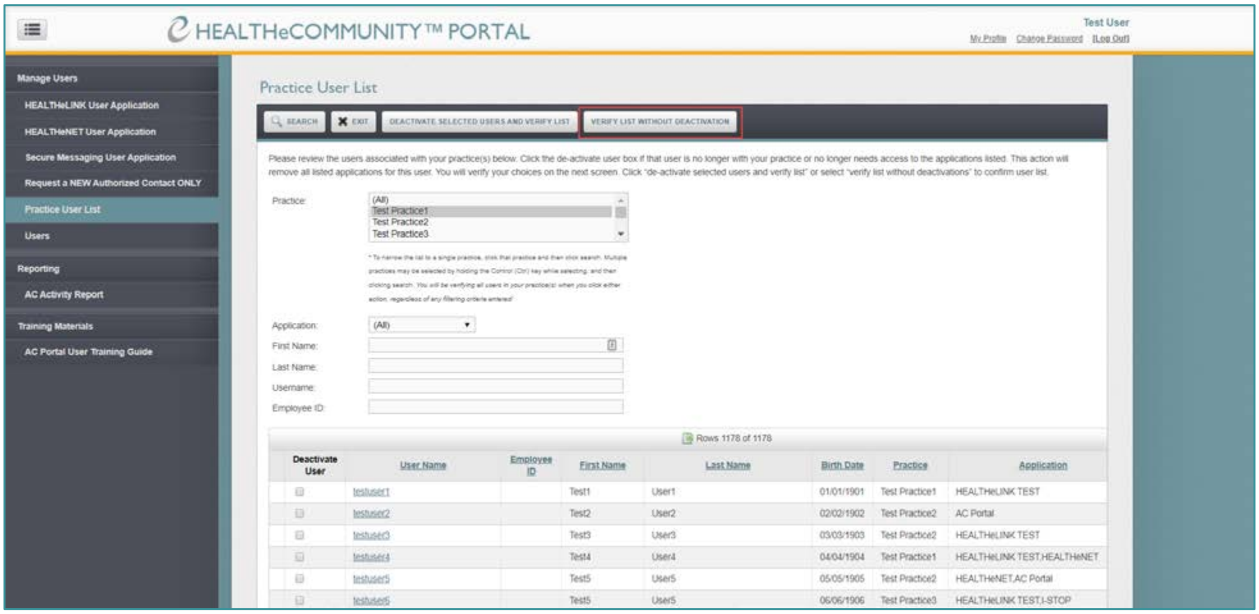


If you manage multiple practices, you have an additional search option: Practice. You can select all, one, or multiple practices using the Practice field. To select multiple practices, click "practices" while holding down [Ctrl] on your keyboard.

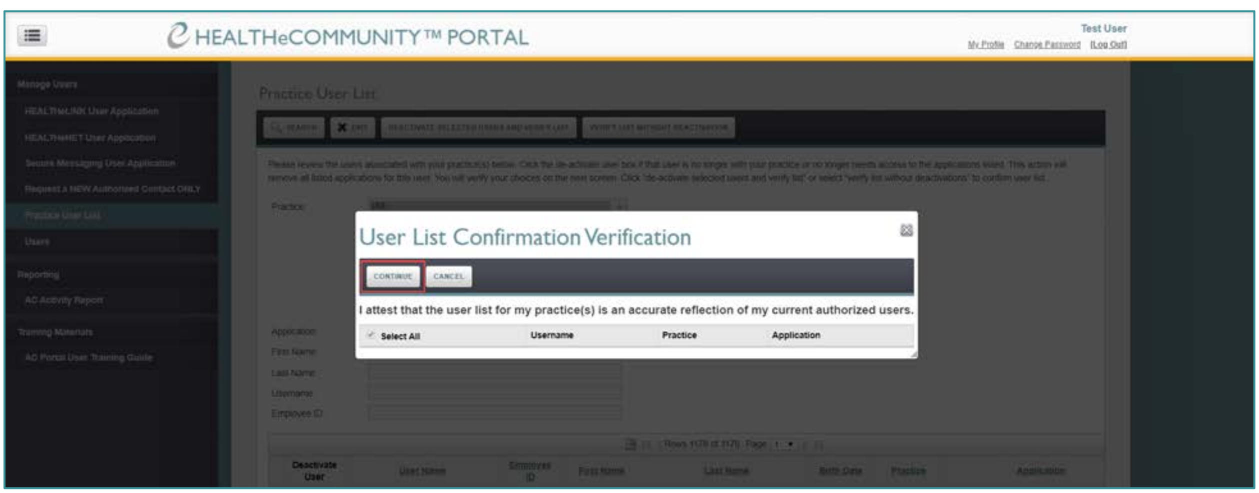
4.1.2. Verifying the Practice User List without User Deactivation

1. Click "Practice User List" on the left hand navigation
    a. 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 section 4.1.3., Verifying the Practice User List with User Deactivation section of this document instead

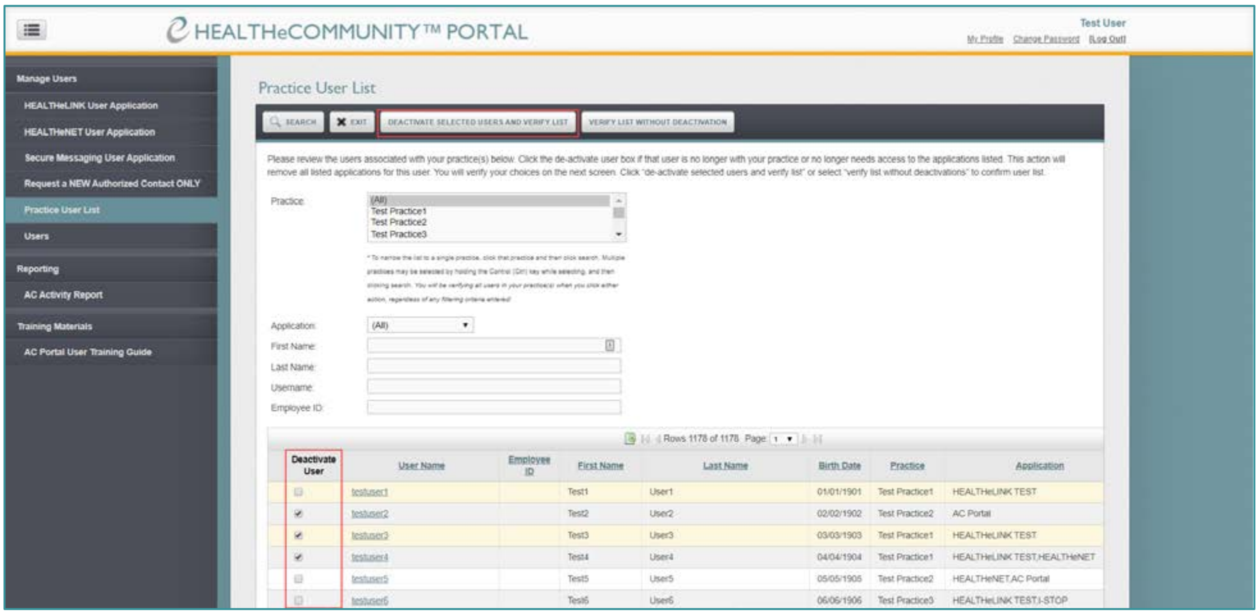
You are required to review user list(s) every 30 days. If you do not review your user list(s), you will be blocked from requesting any HEALTHeLINK or HEALTHeNET users until reviews are completed.

4.1.3. Verifying the Practice User List with User Deactivation

1. Click "Practice User List" option on the left hand navigation
   a. 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.

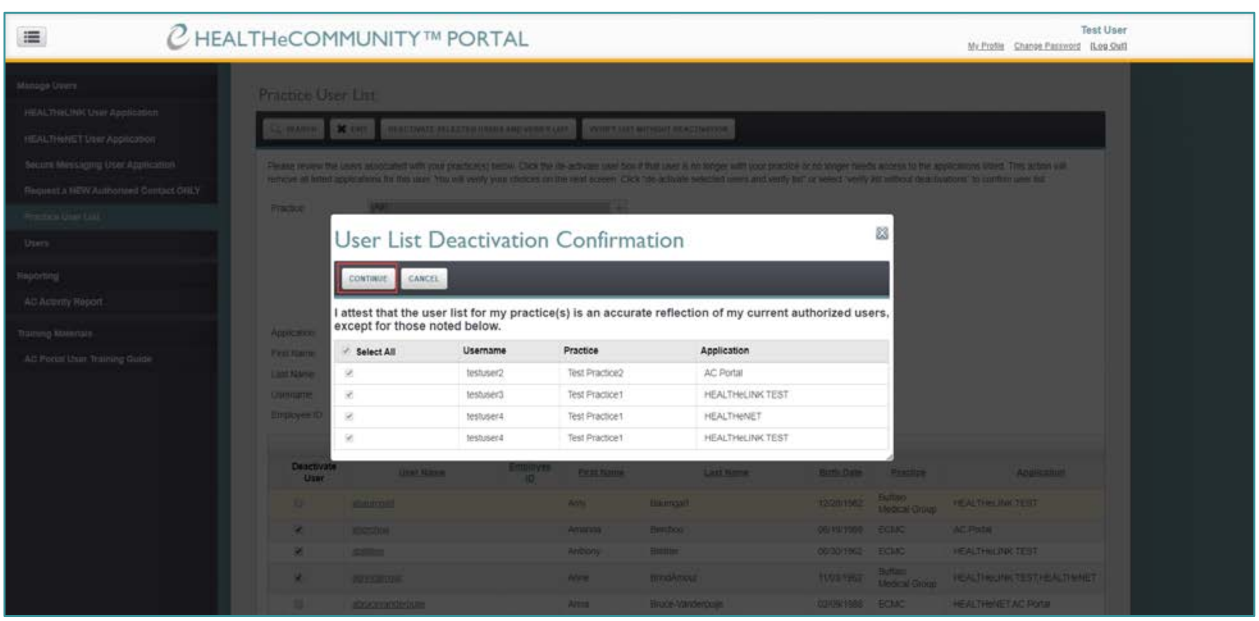
a. If you are the AC for multiple practices, you must review the user list for each practice. To view all users at the same time, select "All" under the Practice search option.

3. If *absolutely all users* in the list are accurate, see section 4.1.2, 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]



i. The pop-up that displays will list the users selected in step 4a with each application for the user listed as a separate line
ii. NOTE: All applications for the user will be deactivated

c. Click [CONTINUE]



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

You are required to deactivate users with 24 hours of termination.

4.2. Users Page and Updating User Records

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

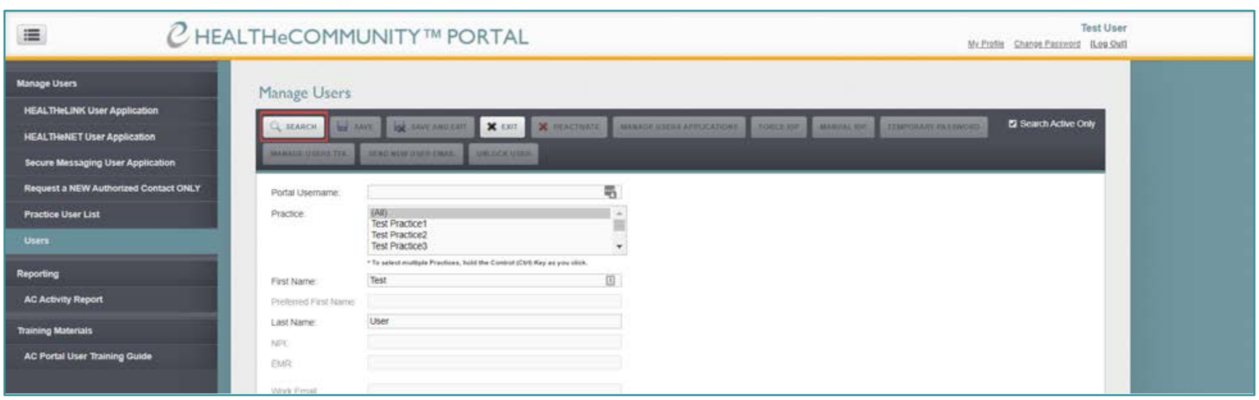
- Reset password and issue a temporary password
- Manually identity proof (IDP) a user who has failed IDP
- Update a work email
- Send a new user email
- Unlock a locked user
- Force a user through IDP

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

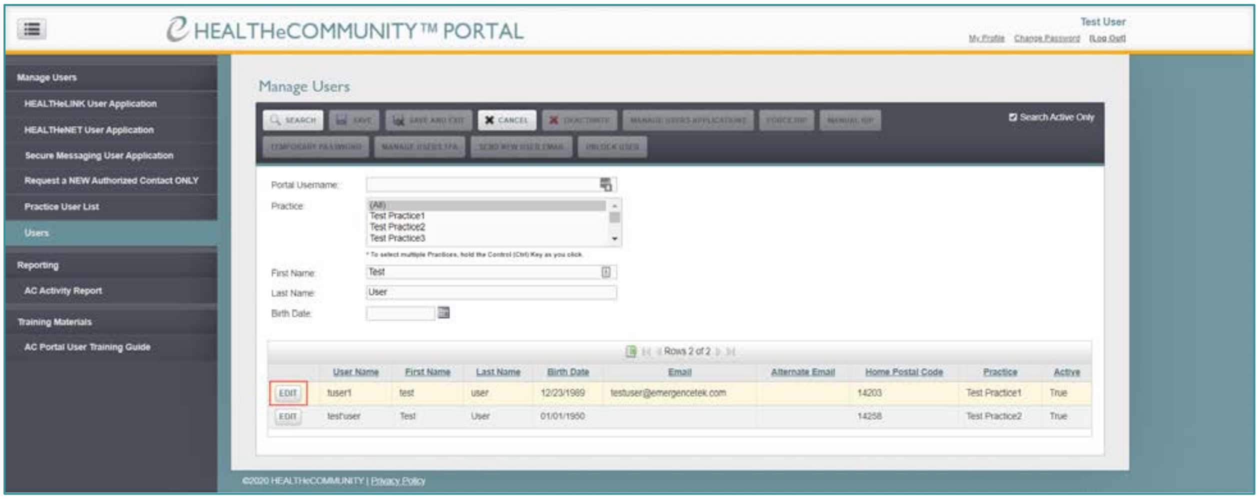
4.2.1. Manual IDP

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:

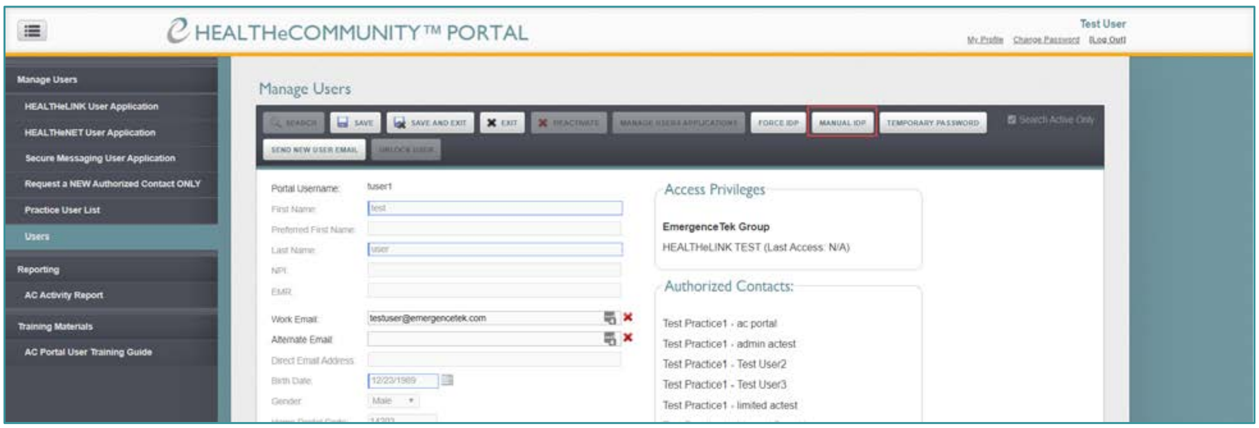
1. Select "Users" option on the left menu
2. Enter user information in search fields
3. Click [SEARCH]



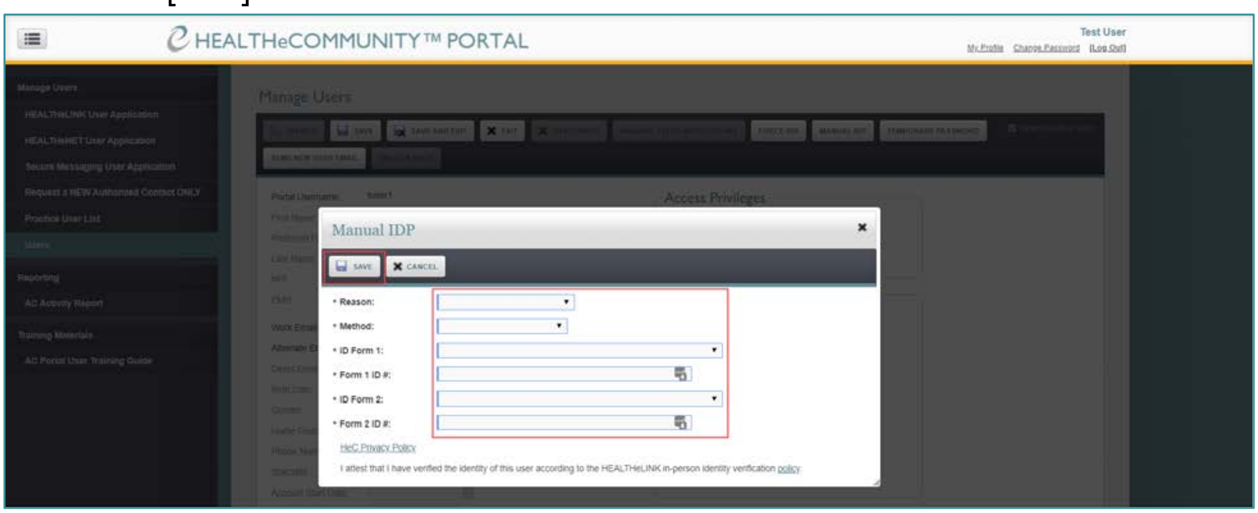
4. Click [EDIT] on appropriate user record



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]

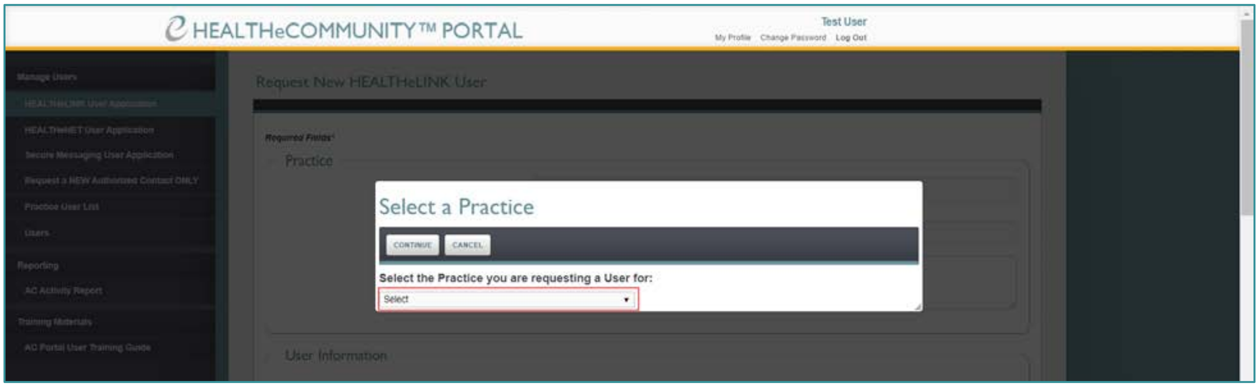


4.3. Requesting a New User Account

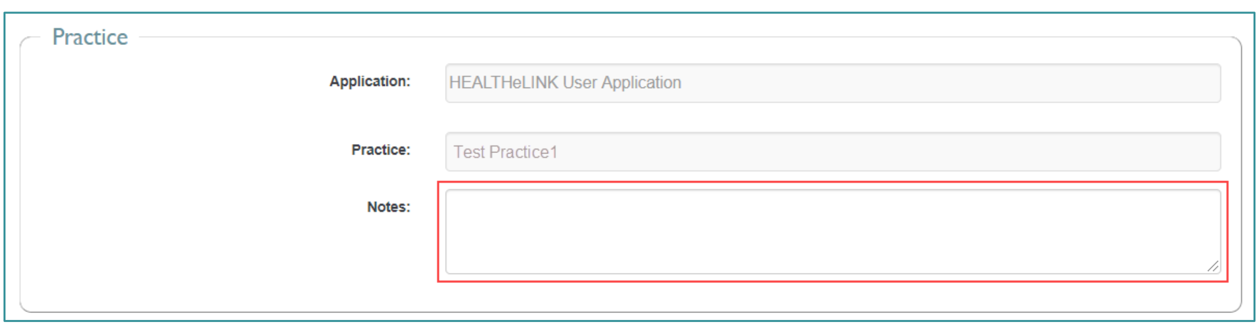
4.3.1. HEALTHeLINK User Application

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

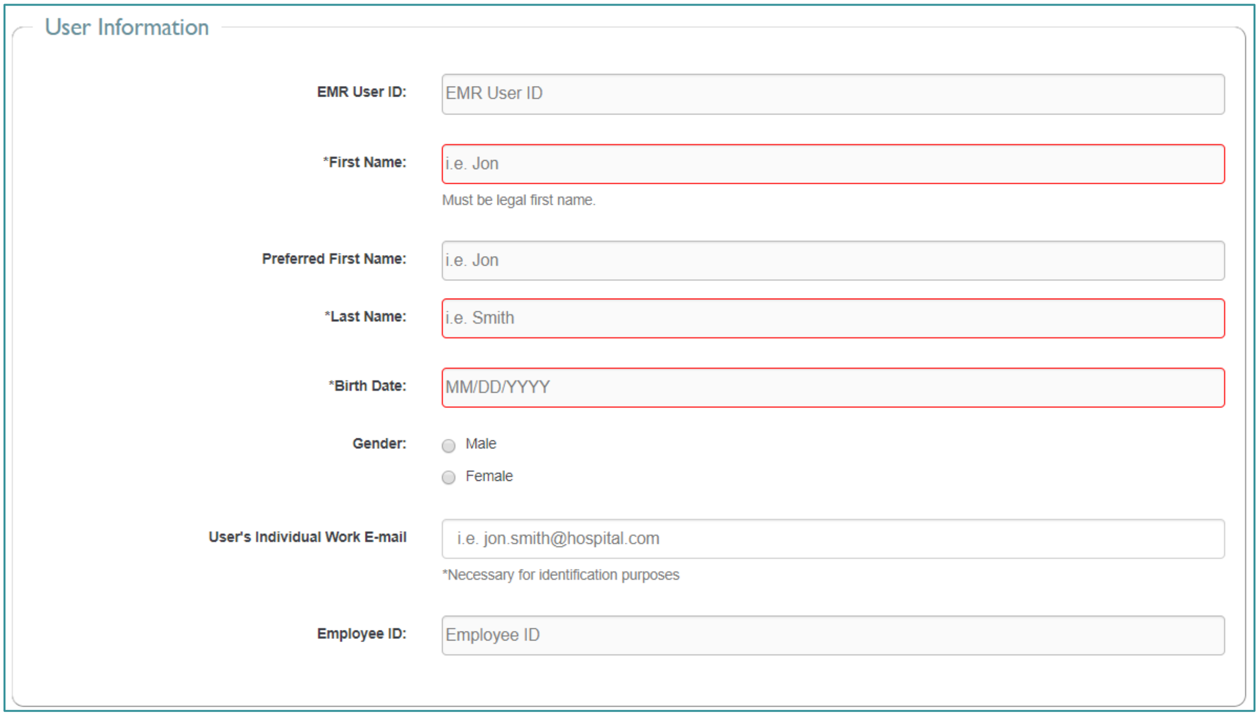
1. Select "HEALTHeLINK User Application" on the left hand navigation
    a. If you are an AC at multiple practices, you must select the practice for the new user prior to filling out the application



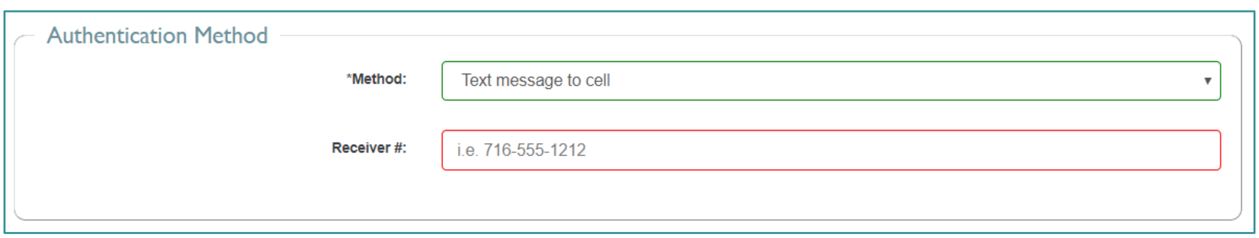
    b. If you have not reviewed your practice list in 30 days, you will be blocked from submitting an application. Click [REVIEW PRACTICE USER LIST] to go to the Practice User List page to verify the practice user list.
2. The Application, Practice, and Organization name fields are pre-filled and uneditable 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)



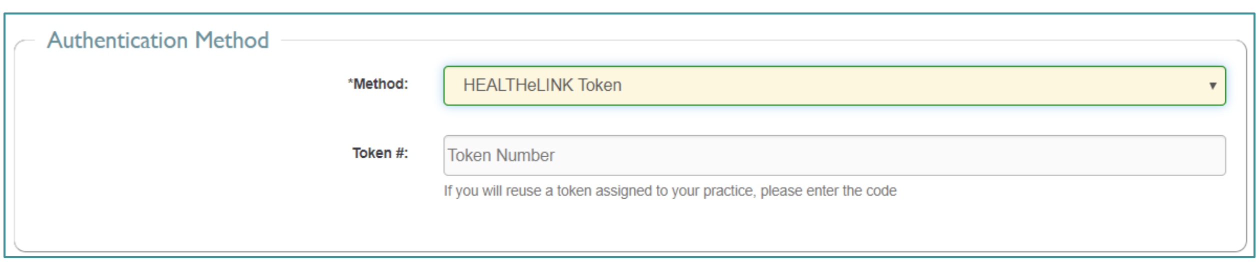
3. Enter user information. The minimum required fields are indicated by an asterisk and are also outlined in red.



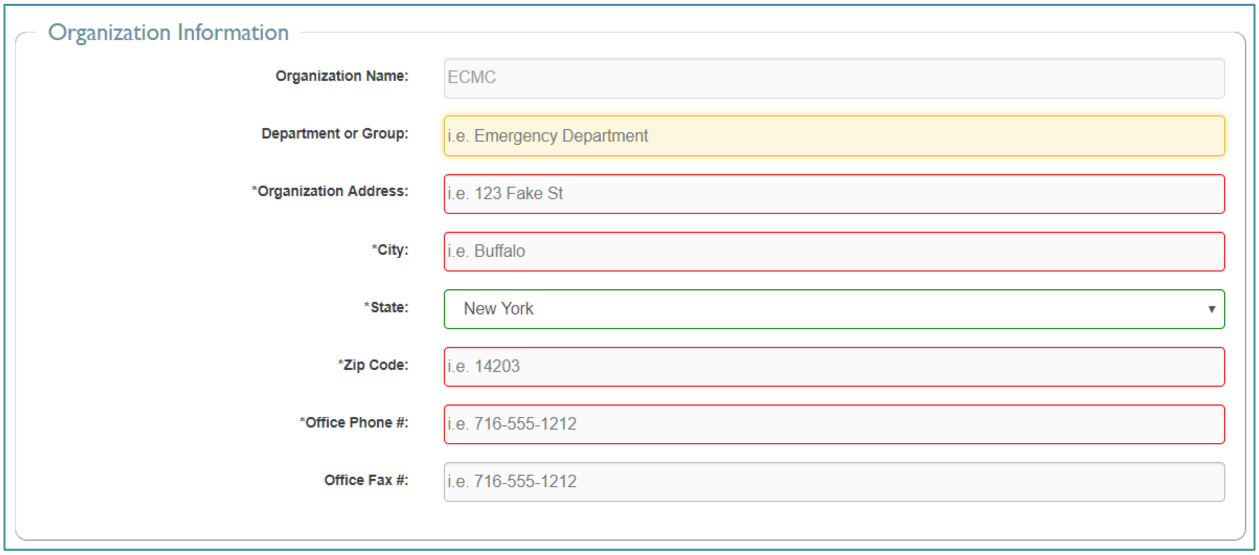
4. Select the Authentication Method from the dropdown
   a. If you are at trusted site of HEALTHeLINK, select "Trusted Site" from dropdown
   b. If selecting "Text message to cell", "Voice call to cell", or "Voice call to landline", you must enter the user's phone number. This must be a personal phone line exclusive to the user.



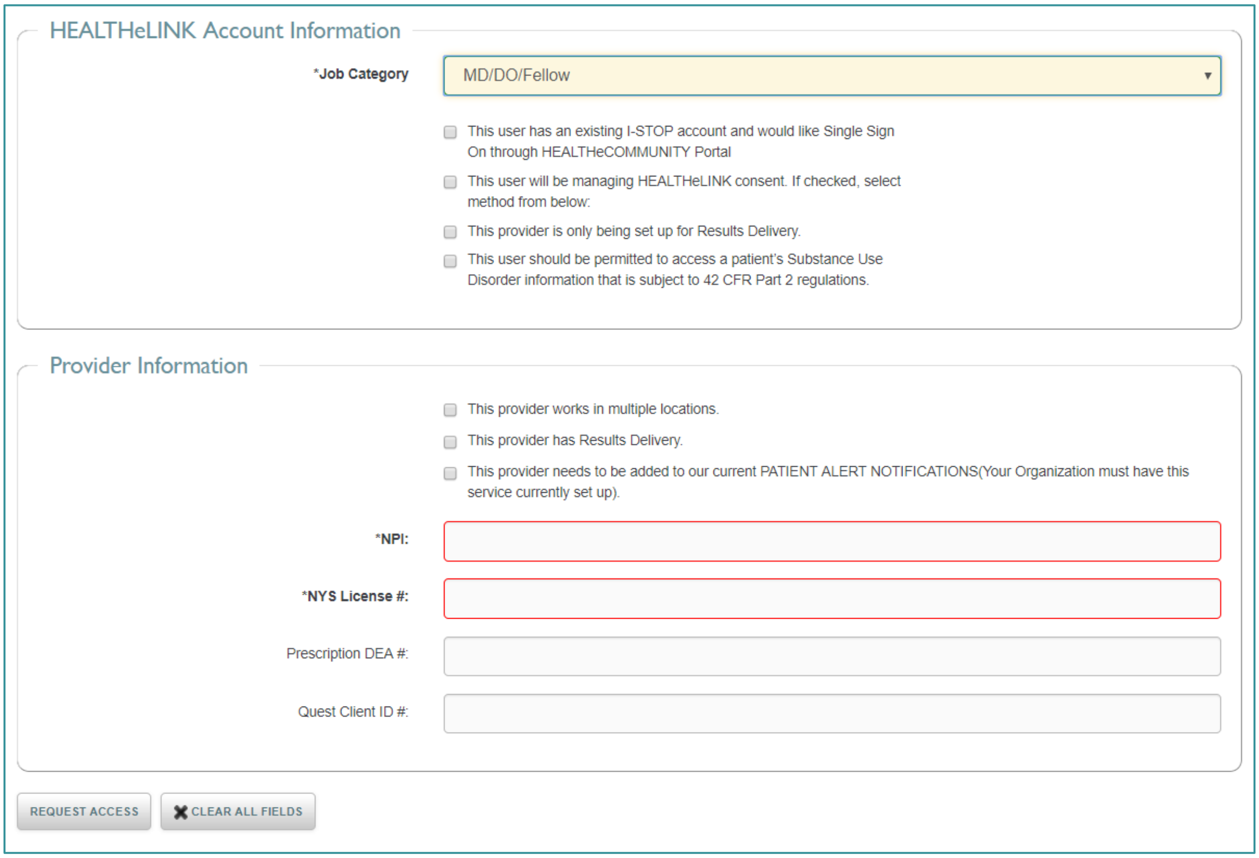
   c. If selecting HEALTHeLINK Token, you have the option to enter a token #. If you have unused tokens at your practice, enter this in the Token # field.



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

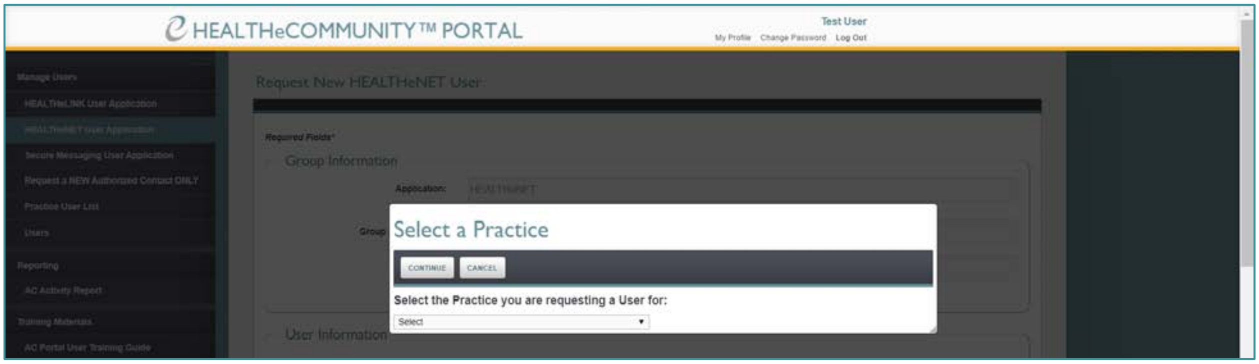
When the account is processed, the user will receive an email from noreply@wnyhealthelink.com. The email will contain a link to the HEALTHeCOMMUNITY Portal to complete their account setup. *The link will expire after seven days and can only be clicked once.* If the link expires and the user needs a password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

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

4.3.2. HEALTHeNET User Application

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

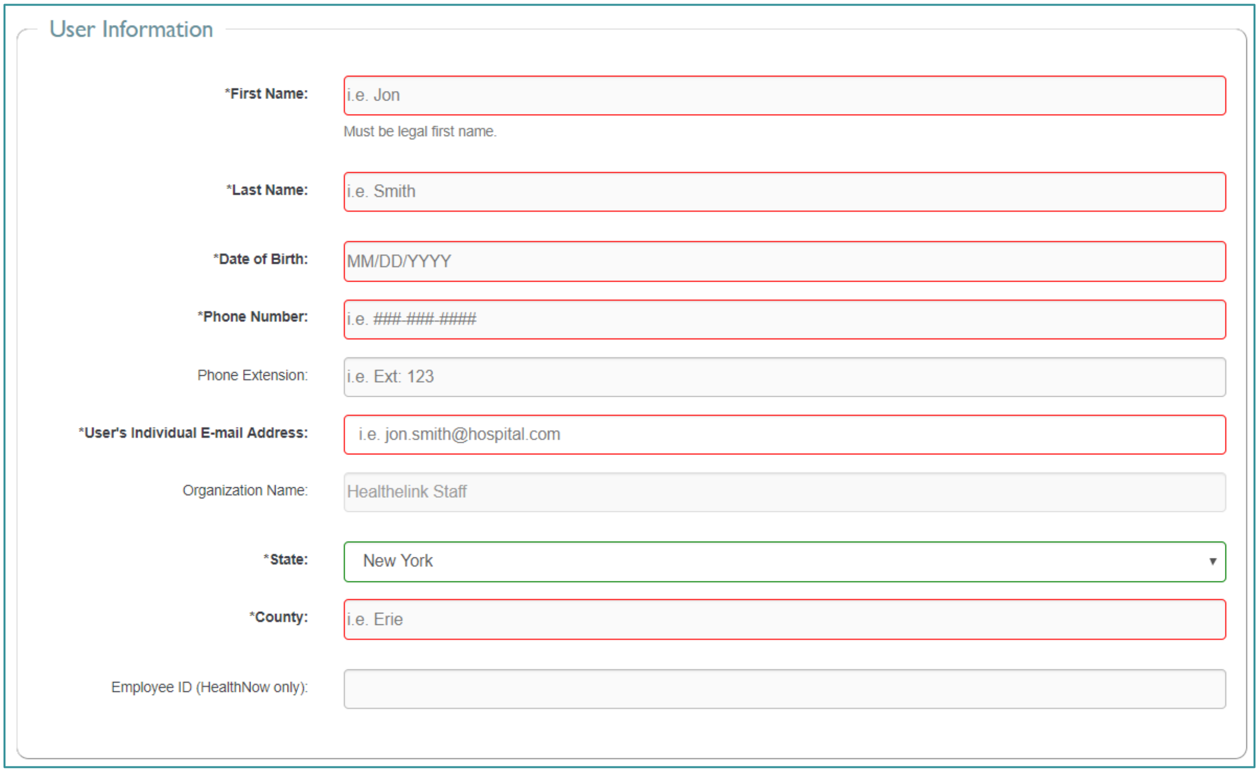
1. Select "HEALTHeNET User Application" on the left hand navigation
    a. If you are an AC at multiple practices, you must select the practice for the new user prior to filling out the application



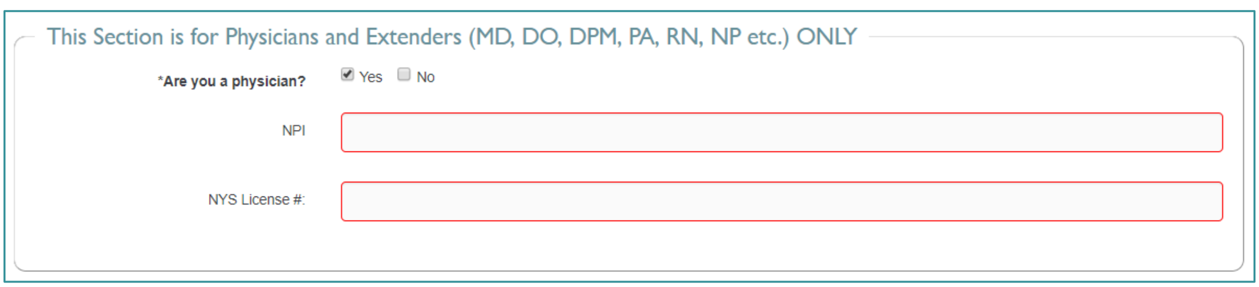
    b. If you have not reviewed your practice list in 30 days, you will be blocked from submitting an application. Click [REVIEW PRACTICE USER LIST] to go to the Practice User List landing page to verify the practice user list.

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

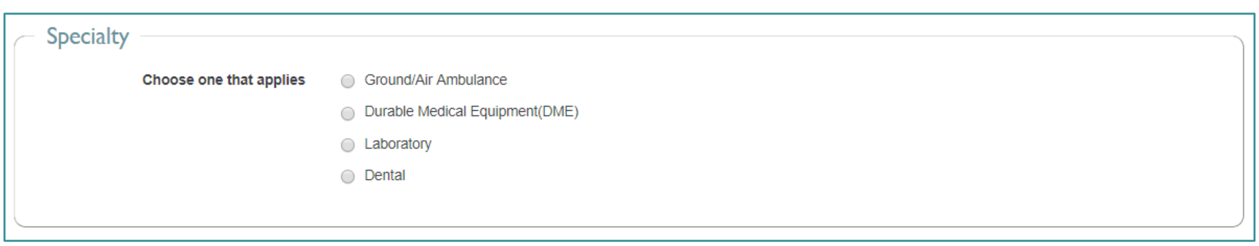
3. Enter user information. The minimum required fields are indicated by an asterisk and are outlined in red.



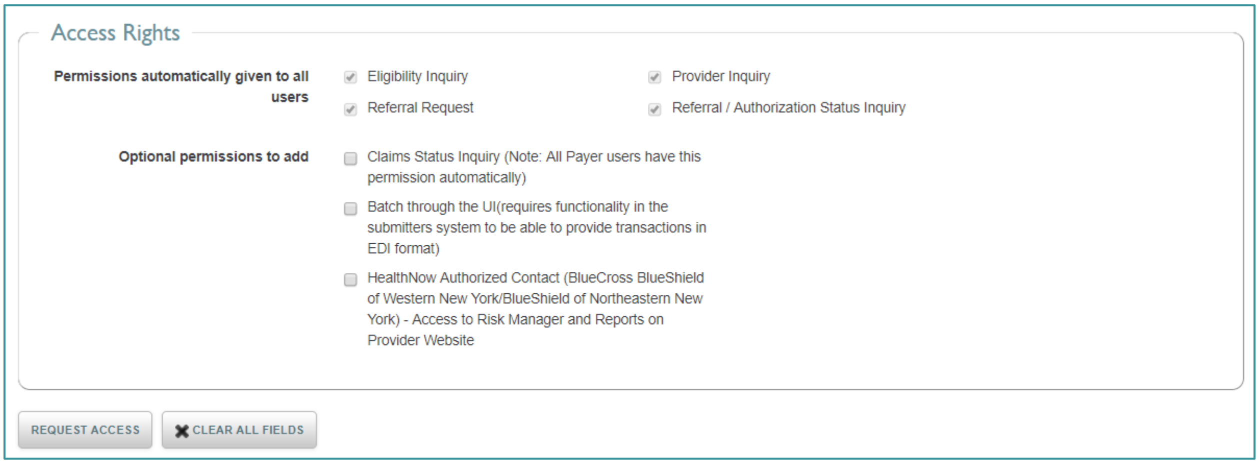
4. Indicate whether the user is a physician
   a. If the user is a physician, you must provide the user's NPS and NYS License # in the appropriate fields



5. Select a specialty, if applicable



6. Select appropriate checkboxes for additional access



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. *The link will expire after seven days and can only be clicked once.* If the link expires and the user needs a password reset, you can use the AC Portal to issue the user a temporary password.

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

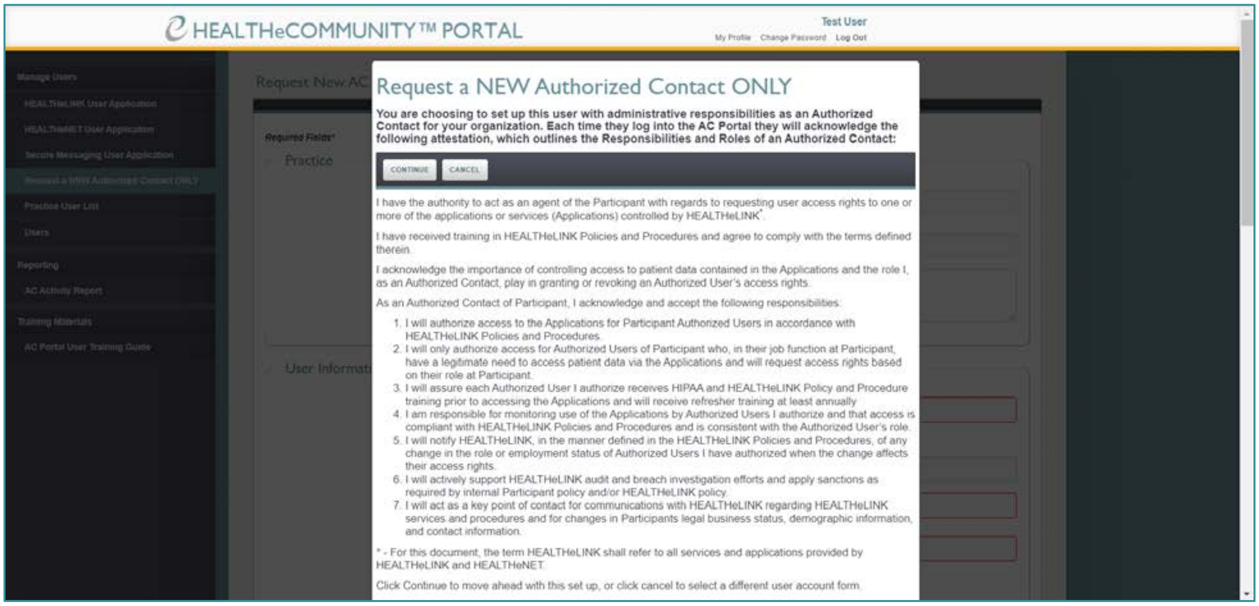
4.3.3. Secure Messaging User Application

This is a missing section that must be added

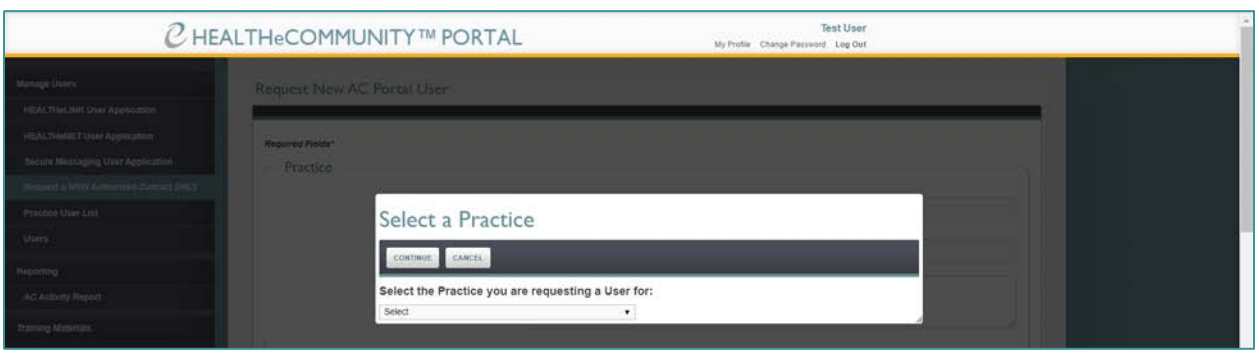
4.3.4. AC Portal User Application

Follow the steps below to request a new authorized contact for your practice.

1. Select "Request a NEW Authorized Contact ONLY" on the left hand navigation
2. Thoroughly read the administrative responsibilities of an AC. If you still want to continue with the additional of an AC to your practice, click [CONTINUE]

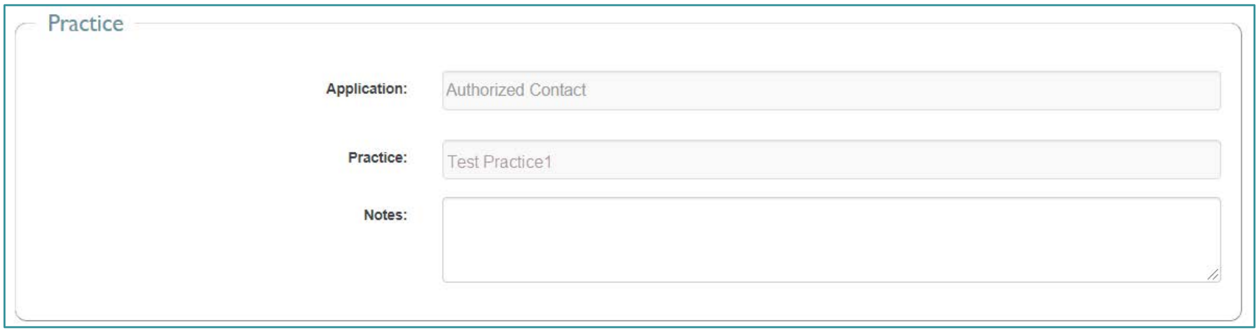


3. If you are an AC at multiple practices, you must select the practice for the new user prior to filling out the application

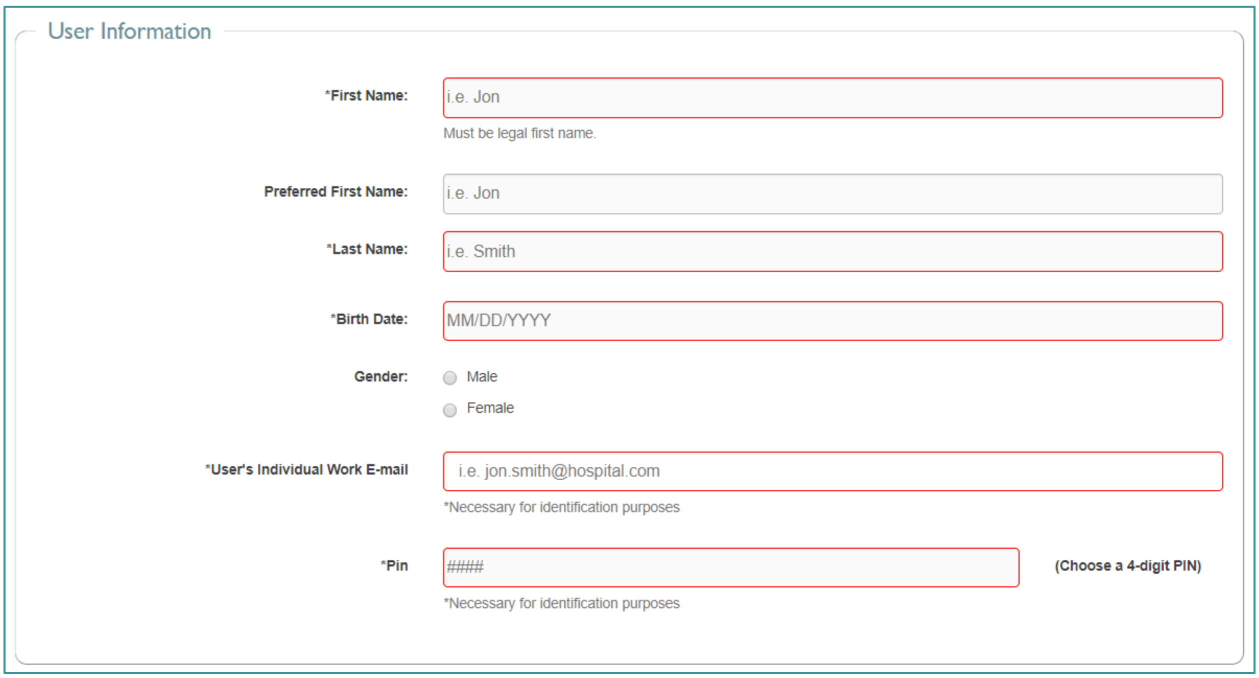


   a. If you have not reviewed your practice list in 30 days, you will be blocked from submitting an application. Click [REVIEW PRACTICE USER LIST] to go to the Practice User List landing page to verify the practice user list.

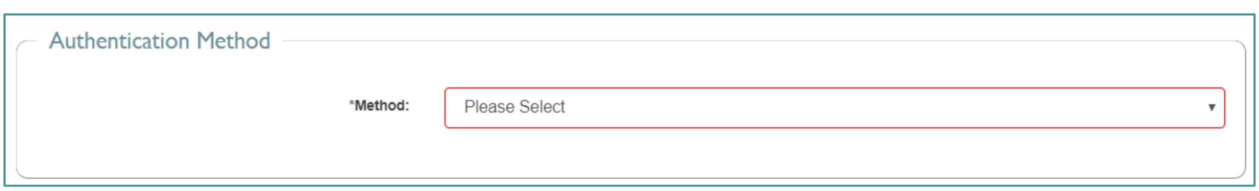
9. The Application and Practice fields are pre-filled and uneditable based on practice selection



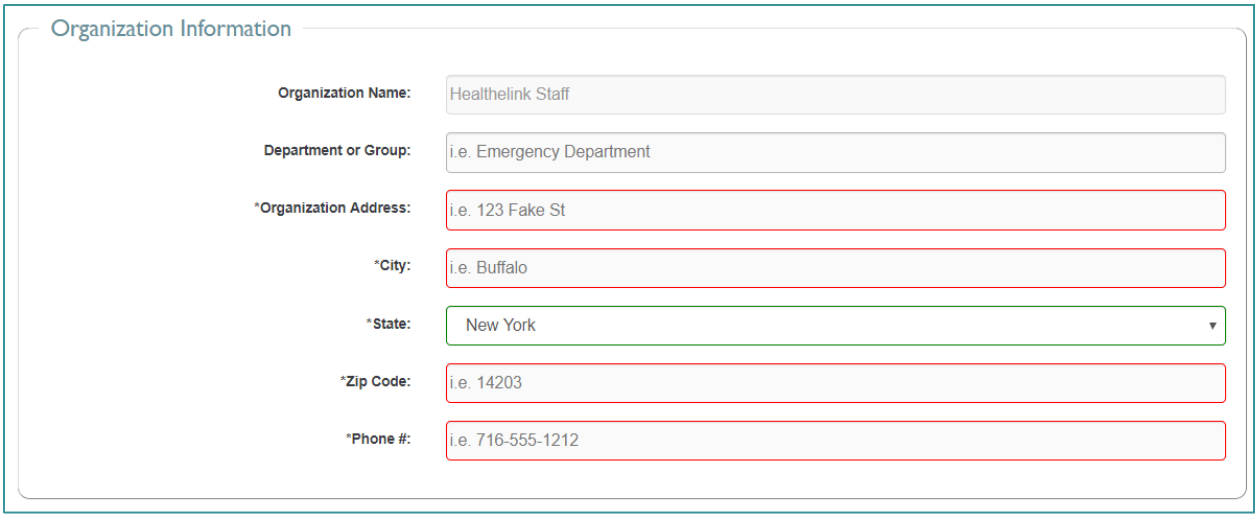
10. Enter user information. The minimum required fields are indicated by an asterisk and are outlined in red.



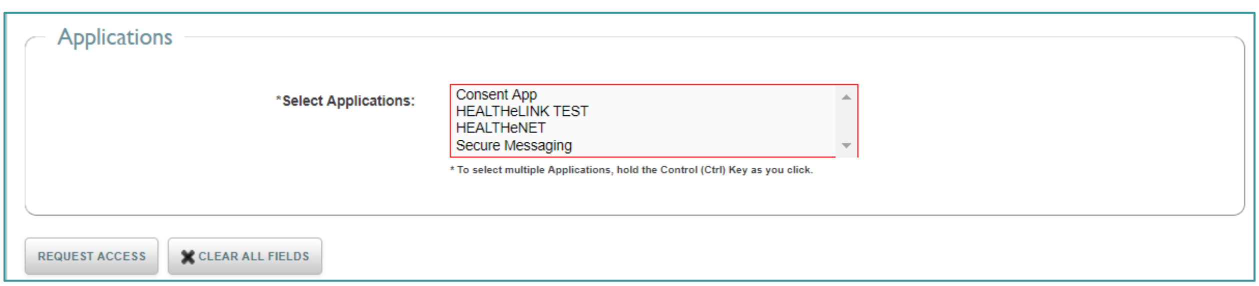
11. Select the Authentication Method from the dropdown
    a. If you are at trusted site of HEALTHeLINK, select "Trusted Site" from dropdown
    b. If selecting "Text message to cell", "Voice call to cell", or "Voice call to landline", you must enter the user's phone number. This must be a personal phone line exclusive to the user.



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



13. Select the appropriate applications from the list. *It is important to remember that the applications selected will allow the new, requested AC to request and deactivate users for that application for your practice.*

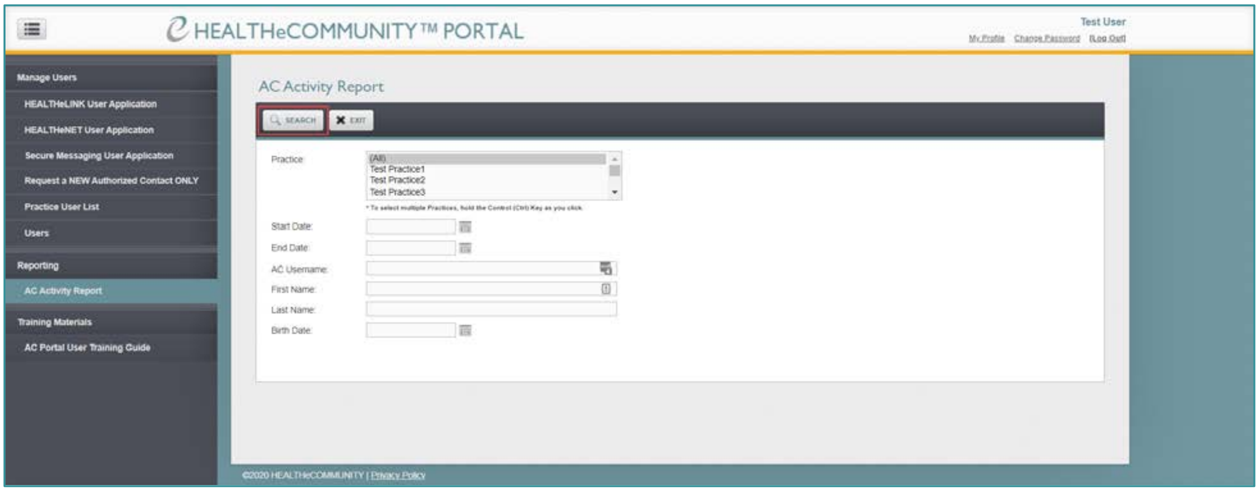


14. Click [REQUEST ACCESS]
15. You will receive an email once the application has been processed

5. 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" from the left hand navigation
    a. Click [SEARCH] to generate the full report
    b. Narrow down your search by entering criteria in the search fields



2. Use the arrows at the top of the list to navigate the report
3. Sort the columns by clicking on the column headers
4. Download the report by clicking on the Excel icon