C C HEALTHELINK HEALTHENET

Authorized Contact (AC) Portal Training Guide

July 16, 2021

v2.2

Contents

What is the Authorized Contact (AC) Portal?
Logging into the AC Portal
Messages 4
Accessing the AC Portal4
DUO Authentication
Attestation Agreement4
AC Dashboard5
Multiple Practice Authorized Contacts5
User Verification Audit
Manage Users
Manual IDP (Identify Proofing)6
Force IDP7
Send New User Email7
User Requests (Setting Up a User for an Application)7
Reporting9
Practice Analytics
General Tips
Help and Support

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.

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

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

	Welcome to the HEALTHeCOMMUNITY Portal	
l s	f you are experiencing issues logging in or have questions regarding this ite, please call the Help Desk at 877-895-4724 or 716-842-6343 or email support@wnyhealthelink.com for assistance.	
	Username	
	sporto	
	Password	
	•••••	
	Login	
	Need help signing in?	
	See all HEALTHeCOMMUNITY Applications	
	This system contains protected information.	
	Unauthorized access is prohibited. By clicking "Login" you agree to all	
	DENTU-UNKO	
	HEALTHELINK Security and Privacy Policies along with other applicable regulations.	

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.

	Susleacmultiple & Logor
Applications	Messages O Critical Messages
AC Portal	Warning Messages AC test AC Portal AC test
© 2021 HEALTHeCOMMUNITY " Privacy Policy	2 Info Messages i AC Test i Test Info

Accessing the AC Portal

Click on AC Portal badge to manage your users.

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: <u>http://wnyhealthelink.com/wp-content/uploads/DUO-Security-TFA-Implementation-Guide.pdf</u>.

Attestation Agreement

In order to gain access to AC Portal, you must first read and accept the attestation.

2 HEALTHeCOMMUNITY™ PORTAL	Elyse Krezmin My Profile Change Password ILog O
Authorized Contact Attestation	
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 servi HEALTHeLINK [*] .	ices (Applications) controlled by
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 User's access rights.	n granting or revoking an Authorized
As an Authorized Contact of Participant, I acknowledge and accept the following responsibilities:	
 will authorize access to the Applications for Participant Authorized Users in accordance with HEALTHeLINK Policies and Procedures. will only authorize access for Authorized Users of Participant who, in their job function at Participant, have a legitimate need to access p will request access fights based on their role at Participant. 	atient data via the Applications and
 In a source dot, number user is automice receives minor and memory number using and incode and in plant to accessing use optraining least annually least annually least annually least annually and the Applications by Authorized Users I authorize and that access is compliant with HEALTHeLINK for consistent with the Authorized User's role. 	Policies and Procedures and is
I will notify HEALTHELINK, in the manner defined in the HEALTHELINK Policies and Procedures, of any change in the role or employmen authorized when the change affects their access rights.	t status of Authorized Users I have
6 unit actively support HEALTHOLINK audit and breach investigation efforts and apply sanctions as required by internal Participant policy a 7. I will act as a key point of contact for communications with HEALTHELINK regarding HEALTHELINK services and procedures and for char status, demographic information, and contact information.	and/or HEALTHeLINK policy. nges in Participants legal business
* - For this document, the term HEALTHELINK shall refer to all services and applications provided by HEALTHELINK and HEALTHENET.	
ACCEPT DECLINE PRINT	

Sample Attestation

AC Dashboard

Upon logging into the AC Portal, the AC Dashboard will be displayed. The dashboard is comprised of multiple badges to assist you with managing your practice(s) and associated users. The following subsections will further explain the features and metrics on the Dashboard.

	NITY AC PORTAL	Select Gener	ed Practices al Physicians PC Healthelink Staff 8	Susieacmultiple
✓ User Verification Audit ✓	Man	စ္ဝူ age Users v	User Requests	Reporting √
Practice Analytics	(showing 1 of 2)			AC Portal Documentation
Next User Verification Audit	Total Users	Users Accessed Last 30 Days	Users Without Access Last 60 Days	8 AC Portal FAQs
(in 15 days)	Ot	6 her ACs	460	← Back to Community Portal

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 (3) to modify the practice(s) that will be displayed.

	PORTAL	7		Selected Practices Healthelink Staff	Welcome Susieacmultiple
✓ User Verification Audit ✓	왕 Manage User	s ^	Select Active Practices sel Healthelink Staff × 0	ect all	☑ Reporting
E Results	Dat	e of Birth	General Physicians	PC	Export to CSV
Username 🌲	First Name 👻	Last Name 🌲	Date of Birth 🗢	Direct Email 🜲	Practice 🖨
Edit muliplepractic AC	User2	MultiplePracti	02/11/2019	user@wnyhealthelink.com	Multiple
Edit utestdog	user	Testdog	10/30/1959	jennybernacki@gmail.com	Multiple

User Verification Audit

As an Authorized Contact, you must verify your list of users every 30 days. AC Portal will not allow you to set users up with an application if you have an outstanding review. The *User Verification Audit* page will allow you to quickly deactivate users, if appropriate, and validate the remaining users who do have access. The following functions are available on this page:

- 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
- You may also click on *Expand Filter* to further refine the displayed users (as seen below)

User Ve	erification Audit	:	Deactiv	rate Selected Users and Verify List	t Verify List Without Deactivation	Export to CSV
All App	lications 3	sporto	Employee ID	First Name	Last Name	 Collapse Filters
	A W	ARNING! Any user who does n	not log in and access any appli	cation over a 180 day period wil	II have their account deactivated automatica	ally.
	Username 📤	Employee ID 👙	🗧 🗧 First Name 🗢	Last Name 🗢 🛛 Da	ate of Birth 🜲 Practice 🖨	Application
	sporto	AC	Susan	Porto (> Healthelink Staff	AC Portal

Manage Users

The *Manage Users* screen provides an alternate display of the users in your selected practice(s). Common filters are displayed by default at the top and can be expanded to further refine the users displayed.

As an Authorized Contact, you can edit a user's email by clicking the *Edit* button. You can also use the *Export to CSV* option if this data is needed outside of Portal.

Note: users will be automatically deactivated if they have NOT accessed in 180 days. When this occurs, an AC will need to reactivate the user by submitting a User Request.

Additional functions are outlined in greater detail in the following subsections.

Manual IDP (Identify Proofing)

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.

Additional information on Manual Identity Proofing can be found at:

https://wnyhealthelink.com/physicians-staff/training-materials/manual-identity-proofing-idp/

Force IDP

The Force IDP function will require a user to go through the security and identity proofing process upon their next login. Potential uses for this function include:

- Suspicious activity is noticed and you want to have a user reverify their identity
- Reset the verification process if a user encountered issues during a previous attempt to verify their identity

Send New User Email

Use this function to send a user an email with a link to access the system if they are unable to login. This is most commonly used when a

user did not click on the activation link when their account was initially set up.

Activation links expire after 7 days.

User Requests (Setting Up a User for an Application)

To submit a user application, select the User Requests tab.







You can submit a request for a single application, or many applications at once by clicking *Multiple Applications*. Each application can only apply for a single practice.

	Selected Practices Welcome Susieacomultiple 2 Close
완 Manage Users 🗸 🗸	🗈 User Requests 🔨 🗠 Reporting 🗸 🗸
	Clear Save
•	Select Applications for Request
Preferred First Name Preferred First Name	HEALTHENLI VA HEALTHENET Staging HEALTHEOUTCOMES
Alternate Email Alternate Email	mm/dd/yyyy
Gender	

If a badge is disabled (see below on right), this is due to an outstanding verification audit for the selected practice. Once you complete the verification process, you can return to this page to continue the user request.



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.

When submitting the request, Job Category will determine whether results can be viewed.

- Clinical Staff: users will have access to results in HEALTHeLINK
- Non Clinical: HEALTHeLINK access will **not** be provided

2	
Resident	Users that need access to RESULTS in
Clinical Staff	HEALTHELINK
Other Clinical Specialist (e.g.	, dentist, podiatrist, pharmacist, PT/OT, etc.)
Organ Transplant User	
Non Clinical	Users for demographic access with NO RESULTS
D	

Reporting

Reporting allows you to see what other ACs in your practice have set up and or deactivated. Enter the ACs username and any activity by this AC will be displayed.

==	■ C HEALTHeCOMMUNITY AC PORTAL							Selected Pr General Ph	ractices nysicians PC He	althelink Staff 🛛 🗐	v Susieacn	Velcome <u>Cle</u>	
	🗸 User Ver	ificati	ion Audit	~	答 Manag	e Users	~	🛓 User Requests		~	🗠 Reportin	9	^
	🖹 Results	- I Q	sporto	C User Name	📔 🗸 Expand Fi	lters						(Export to CSV
	Action Taken By	¢	Action Date 👻	Action Taken 🗘	First Name 🖨	Last Name 🗘	Practice Name 单	Portal Username	Application Name	Application Username	AC Applications	Part 2 Access ≑ Requested	Managing Consent
	sporto		05/25/2021	Access Requ	sue	porto	Healthelink Staff		HEALTHeLIN			0	0
	sporto		05/25/2021	Access Requ	Test	Test	Healthelink Staff		HEALTHeLIN			0	٢
	sporto		05/24/2021	Access Requ	Susie M	Test	Healthelink Staff		HEALTHeLIN			0	٢
	sporto		05/24/2021	Access Requ	Susie	Test	Healthelink Staff		HEALTHeLIN			0	0
	sporto		03/16/2021	Access Requ	Susie	TestsingleAC	HEALTHeLINK		HEALTHeLIN			0	0
	sporto		03/16/2021	Access Requ	Susie	Test SingleAC	HEALTHeLINK		HEALTHeLIN_			0	۲
	sporto		03/09/2021	Access Requ	Susie	SingleRequest	HEALTHeLINK	ssinglerequest	HEALTHeLIN	sporto2500		0	0
	Showing page	e1of1(1 - 7 of 7 total record	ds)								«	< 1 > »

Practice Analytics

You will also see data presented that is practice specific, such as when your Next User Verification Audit is due, Total Users set up in your practice, Users that accessed in the last 30 days, and Users Without Access in the Last 60 days.

	TY AC PORTAL		Selecter General	I Practices Physicians PC Healthelink Staff {	9	Welcome Susieacmultiple Close			
VUser Verification Audit	Mano	age Users		User Requests		I ∼™ Reporting ✓			
Practice Analytics 🔹 🗲 (s General Physicians PC	Practice Analytics (showing 1 of 2)								
Next User Verification Audit Jun 23 2021	Total Users 466	Users Accessed L Days	ast 30	Users Without Access Last 60 Days	ଟ	AC Portal FAQs			
(in 15 days)	÷	Back to Community Portal							

General Tips

- All Fields with an asterisk (*) must be filled out.
- 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.

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 <u>support@wnyhealthelink.com</u>.

Additional training materials are available on our **HEALTHELINK** website.