Authorized Contact (AC) Portal Training Guide

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v2.2

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, 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 (www.wnylink.com) with your login credentials.

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.
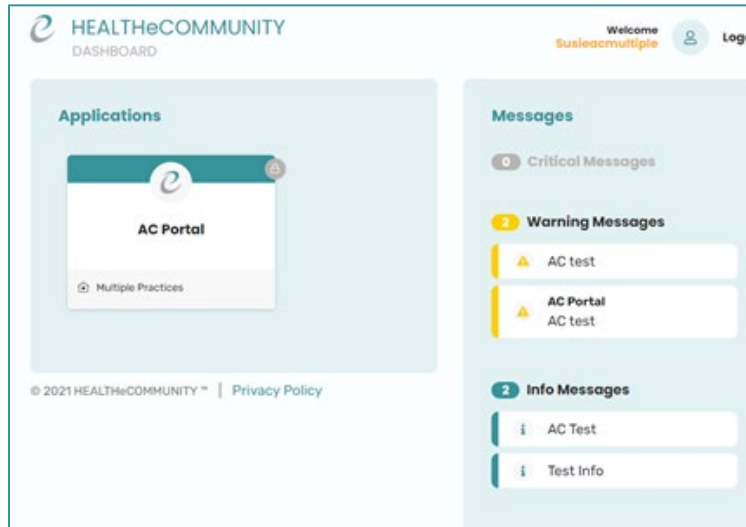
Accessing the AC Portal

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:
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.
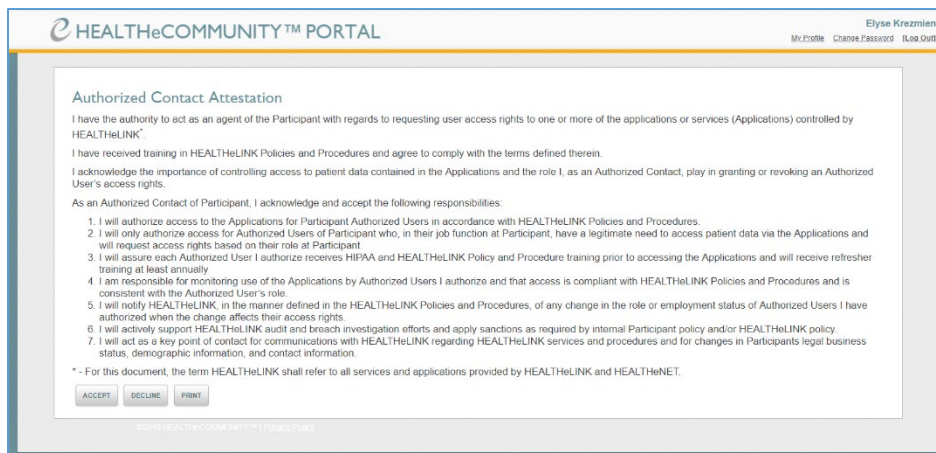

Sample Attestation

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.
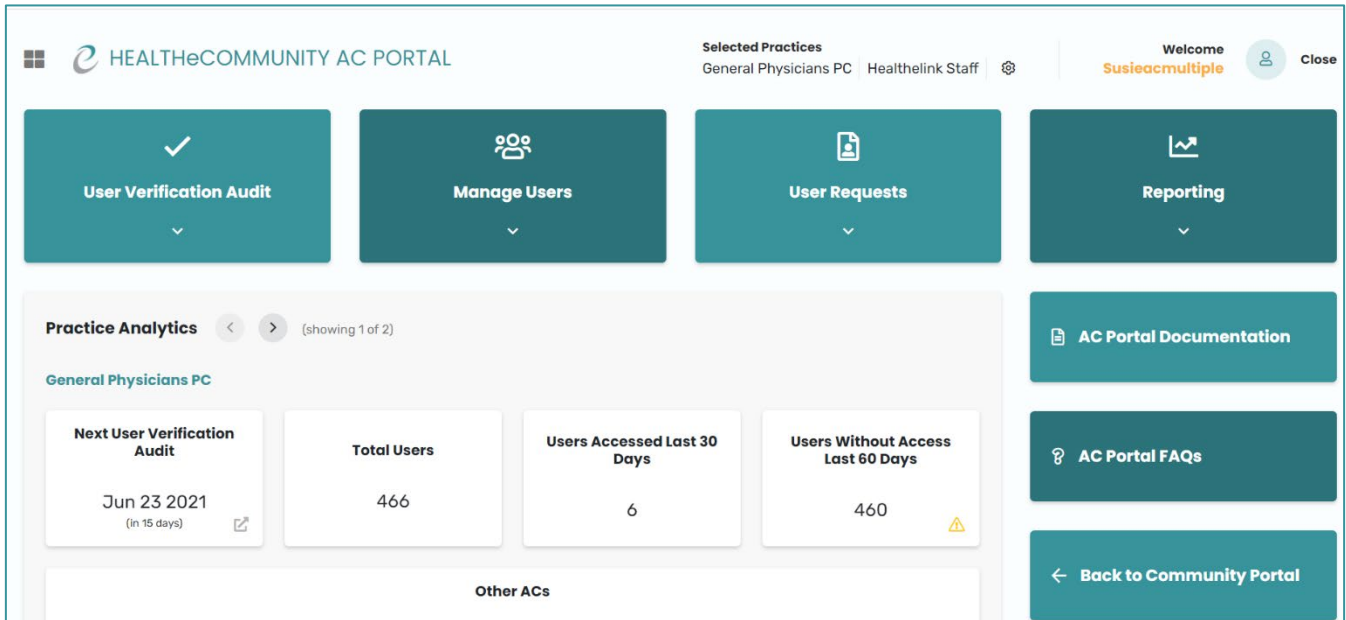
Multiple Practice Authorized Contacts

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.
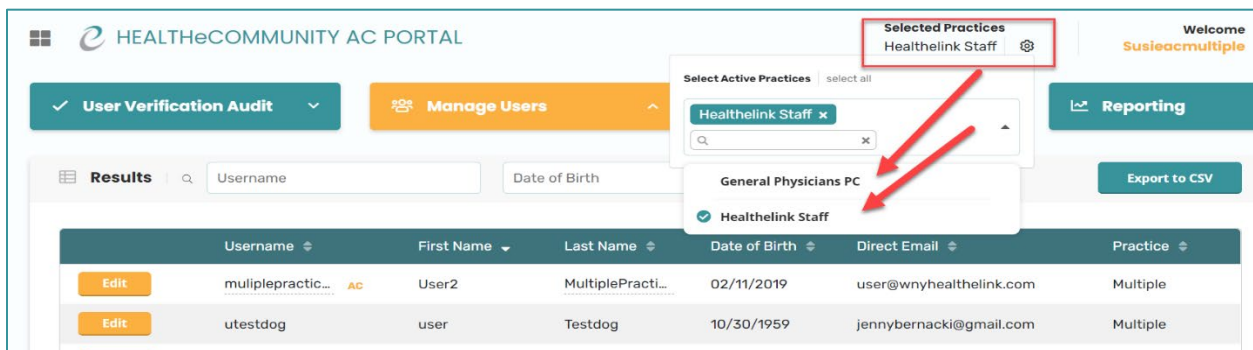
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User Verification Audit

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 Verification Audit			Deactivate Selected Users and Verify List	Verify List Without Deactivation	Export to CSV

All Applications ✕	sporto	Employee ID	First Name	Last Name	⌃ Collapse Filters

⚠ **WARNING!** Any user who does not log in and access any application over a 180 day period will have their account deactivated automatically.

☐	Username ▲	Employee ID ⇅	First Name ⇅	Last Name ⇅	Date 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.

IDP
Manual IDP

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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:

> **IDP**
> Force IDP

- 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.

> ✉
> Send New User Email
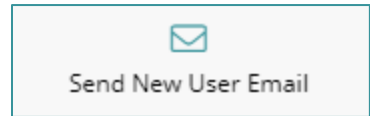
Activation links expire after **7 days**.

User Requests (Setting Up a User for an Application)

To submit a user application, select the *User Requests* tab.
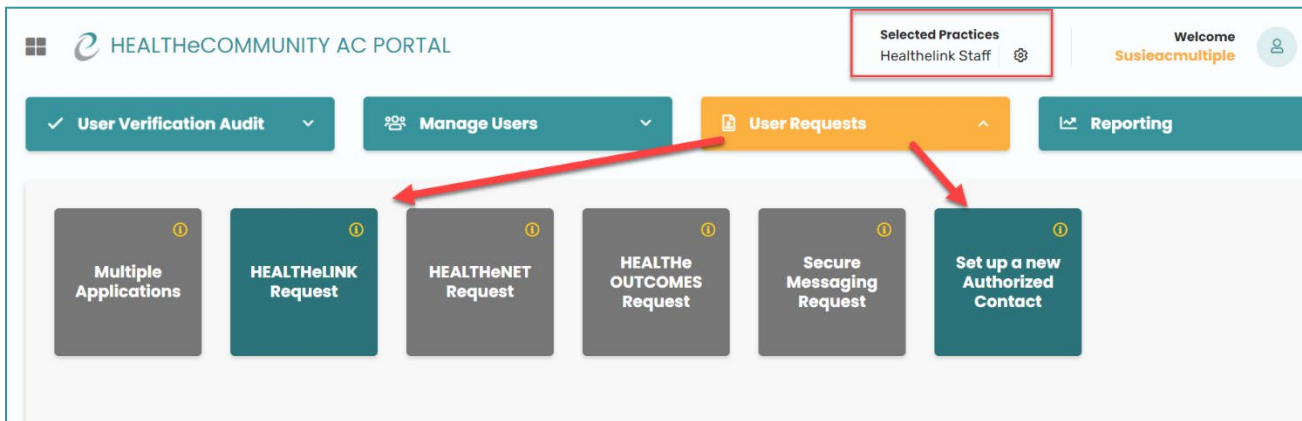
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You can submit a request for a single application, or many applications at once by clicking *Multiple Applications*. Each application can only apply for a single practice.

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.
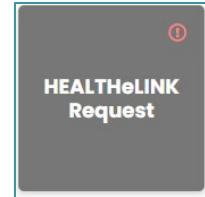
The applications you can request are determined by your permissions with the practice that is selected. To request additional permissions, please contact your HEALTHeLINK Account Manager.

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

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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.

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*.

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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 support@wnyhealthelink.com.

Additional training materials are available on our HEALTHeLINK website.