

Community Links Portal: Professionals

Companion Guide for ASAPs

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What is the Community Links Portal?

The **Community Links Portal (CLP)** is a secure web-based portal offering health professionals, with consumer consent, a read-only view of relevant consumer information from the SAMS database. It is a new way for ASAPs to partner with Health Care Organizations (HCOs) for the benefit of shared consumers.

Consumer information shared with HCOs on CLP comes directly from the ASAP care managers and nurses who regularly visit the consumer in their home, and who assist them on a day to day basis with their care. CLP displays information from the most recent assessment, as well other key data elements from the consumer record, specifically intended to address the health professional’s most common areas of concern.

Patient data available on the CLP includes:

- Emergency contacts, Advanced Directives
- Service Plan for Home- & Community Based Services
- Content from the semi-annual assessment based on a Home Visit
 - “Comments” = Assessment Narrative from the Care Manager or RN
 - Pain & Falls
 - Medications (self-reported performance, difficulty, list)
 - Mood & Behavior
 - Home Environment
 - Informal Support Services
 - IADL - Instrumental Activities of Daily Living
 - ADL - Activities of Daily Living
 - Care Manager-specific communication to Home Care Organization CLP user

Purpose of this Companion Guide

Audience for this document

This Companion Guide is intended for ASAP personnel who will manage the initial implementation of CLP at their agency, as well as provide ongoing support for internal and HCO users of the application. It is assumed that one or more person involved in the process has access to SAMS Administrator.

Objective

The objective of this Companion Guide is to give ASAP personnel the information they need to begin using **Community Links Portal: Professionals** with their partner HCOs.

Identifying Prospective Partners

Get the word out to HCOs in your service area

CLP is a new way for ASAPs and HCOs to form partnerships, and ASAP investment and active participation in promoting it as an important tool that will benefit both parties is essential. There are resources available to assist in an ASAP's direct outreach to organizations that serve shared consumers. Note also that Care Managers and Nurses should have a working knowledge of CLP as they discuss cases with fellow professionals.

Available Resources:

Program One-Sheets – Quick, simple description of CLP benefits geared to a prospective HCO

Community Links Blog – Website with most recent CLP documentation and project information, including consent forms, and User Guides for all participants.

(<http://community-links.800ageinfo.com/>)

Meet with selected HCO partner

Once contact and preliminary interest in a partnership has been established, ASAPs should meet directly with an HCO to exchange more detailed information. Tasks for this meeting include:

- Provide CLP materials & discuss specific data items that are available to view
- Determine level of practical interest – how would CLP be used on a day to day basis?
- What type of organization? Large health care providers, physician's practices, community health centers, likely have differences in how they would use the information available on the portal.
- Collect information on lead contacts, staffing capability, number of potential sites

ASAP tasks once a partner is confirmed

✓ Submit the signed Organizational Consent Agreement

Before any consumer information can be shared using CLP, a consent agreement detailing requirements of both parties must be signed by both the ASAP and the HCO. The signed and dated form should be

forwarded to [EOEA CLP contact] and precedes any HCO use of the application. It is available through the EOEA CLP website ([http://community-links.800ageinfo.com/.](http://community-links.800ageinfo.com/))

✓ **Complete Community Links HCO Provider Information Form**

The ASAP must complete the **CLP HCO Provider Information Form**, accessible through the EOEA CLP website ([http://community-links.800ageinfo.com/.](http://community-links.800ageinfo.com/)) containing essential information about the HCO.

✓ **Identify the HCO Custodian**

The *Custodian* is the HCO's lead contact, and performs several important functions in CLP.

Custodian is the HCO's Initial Point of Contact with CLP:

Once the HCO is created in SAMS (see *Two Steps to Enrollment* section, below) an email is sent to the *Custodian* with instructions for logging into the Community Links Portal.

Custodian Manages the HCO Users:

The Custodian has the ability to manage CLP users in the following ways:

- Add or Deactivate Users
- Edit user name or phone number
- Re-send credentials for a single user or all users

✓ **Identify Initial Group of Shared Consumers**

Before the CLP is activated, HCOs and ASAPs should decide on an initial group of shared patients to target for enrollment. How this is achieved can vary greatly depending on the technical capacity of the parties involved. ASAPs can produce reports from their consumer database that identify primary care physicians which can be used as a starting point.

✓ **Receive & Document Consumer Consent**

Proper consent must be received from the consumer before their information can be shared with an HCO. The updated version of the **Applicant Consent and Disclosure Form** was released 3/31/14 and was thereby mandated for all consumers receiving services through State Home Care programs. This consent form must be reviewed and signed by the consumer prior to an HCO accessing shared consumer information through the CLP.

Consumers who Refuse Consent for CLP Access

What if a consumer signs the consent form but does not want to have their information shared through the Community Links Portal?

The consumer certainly has the right to refuse to share information through the CLP. This possibility has to be accounted for in the method that signed consent forms are tracked in SAMS.

In these instances, follow the procedure for adding a provider to the consumer record, but instead of adding an active HCO Web Access Provider, add the provider named **Community Links Portal – REFUSED Web Consent** as show below. A list of consumers who have *refused* to give consent for CLP usage can therefore be reported on along with those who have consented.

The screenshot shows a form titled "Provider - Community Links Portal - REFUSED Web Consent". At the top, there are navigation links: "OK | Cancel | Add Next | Open Audits | View Users |". The main form area contains the following fields:

- Provider:** A dropdown menu with the selected value "Community Links Portal - REFUSED Web Consent". This field is highlighted with a red box.
- Is Default:** A checkbox that is currently unchecked.
- Start Date:** A date input field containing "3/17/2014" with a calendar icon to its right.
- End Date:** A date input field containing the placeholder text "Enter date" with a calendar icon to its right.
- Information Release Authorized:** A checkbox that is currently unchecked.

Two steps to enrollment

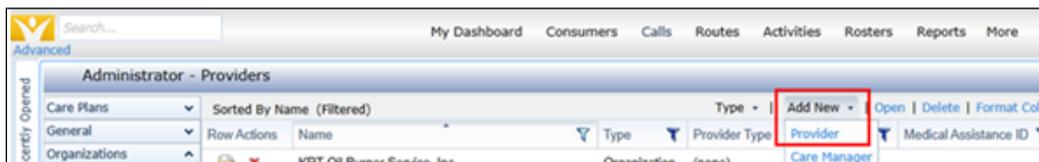
Allowing a consumer’s information to be viewed by an HCO is a two-step process requiring:

- Organizational changes performed by EOEA in SAMS Administrator, and
- Individual consumer level tasks completed by the ASAP

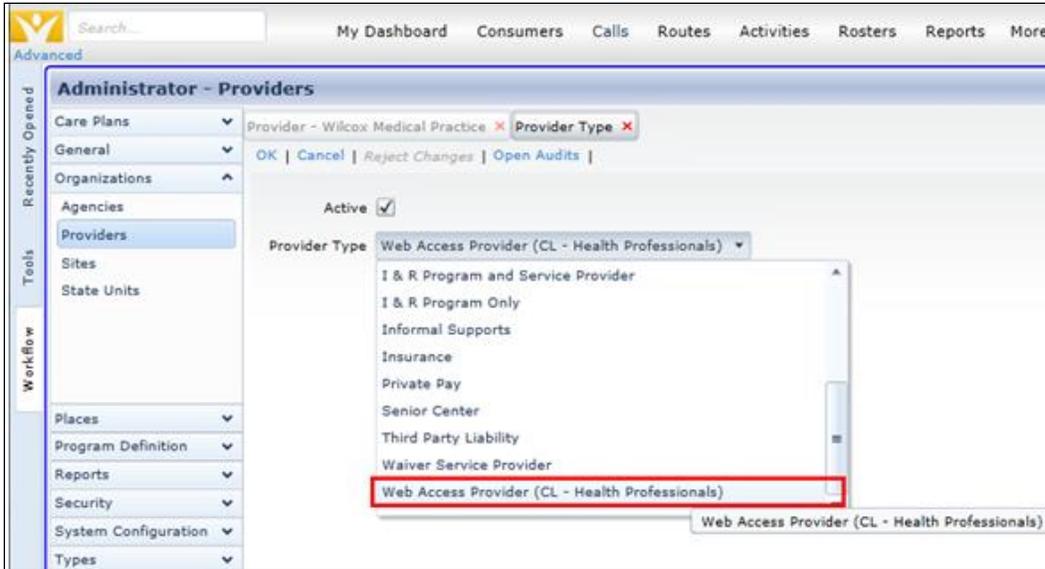
Organization level

Once the ASAP Statement of Interest form and the signed consent between ASAP and HCO has been received, EOEA will perform two specific tasks in SAMS Administrator to enable the HCO’s access:

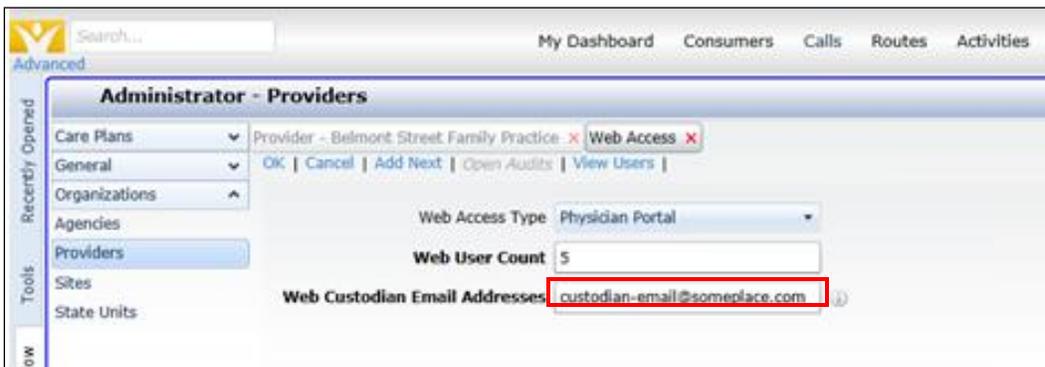
1. Create HCO as a Web Access Provider (or add web access capability if the provider already exists)



EOEA Task:
Adding new provider in SAMS Administrator as a “Web Access Provider”

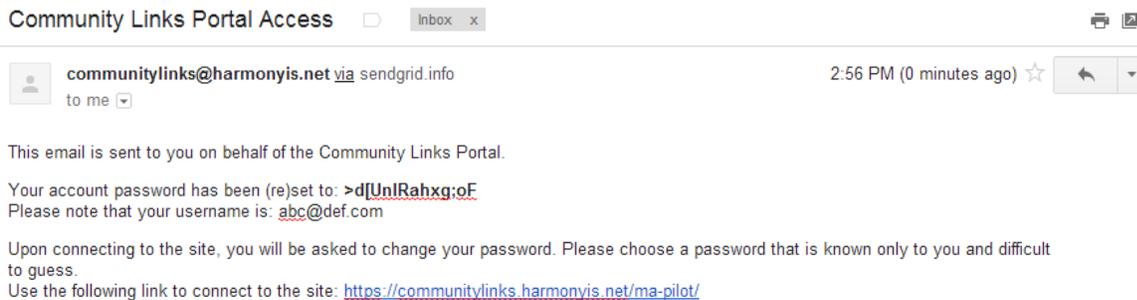


2. Add the designated HCO Custodian's email address to the provider record



EOEA Task:
Adding HCO
Custodian email
address to
provider record

This action triggers an email notification to the HCO Custodian containing a temporary CLP password:



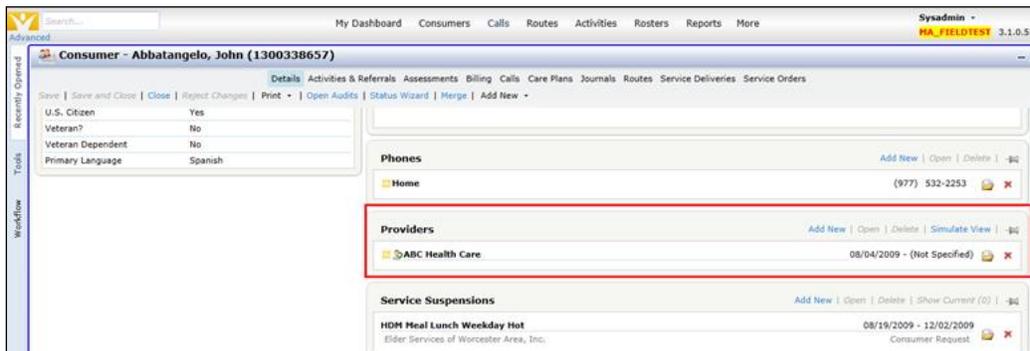
Note that the EOE Administrator can *Send Credentials* if the Custodian forgets their password:



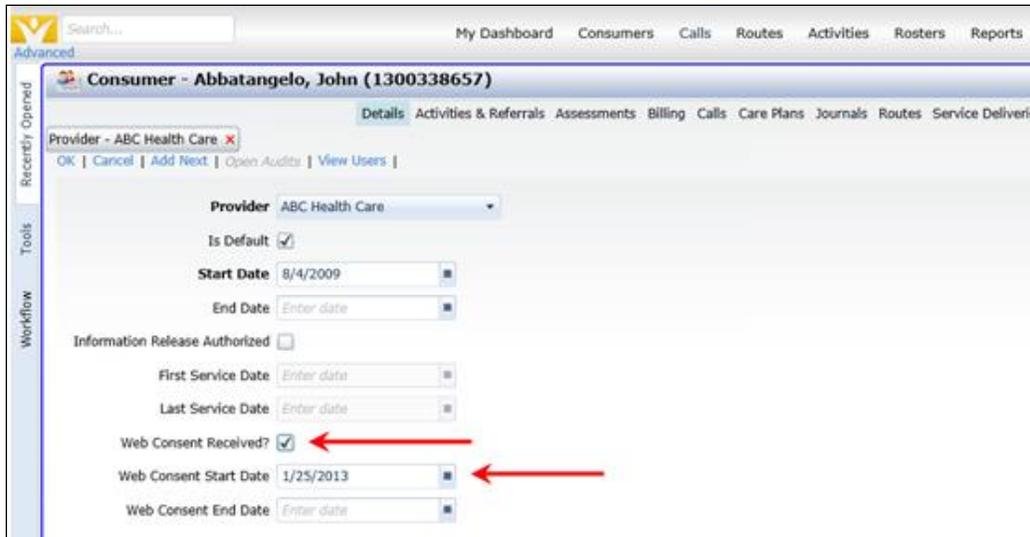
Individual Consumer Level

Once EOE has completed the administrative tasks, and organizational and consumer consent has been documented, the ASAP is ready to enroll individual consumers to be viewed by the selected HCO using a simple two-step process:

1. From the consenting consumer's detail screen, access the Provider's section. Add the HCO organization as a New Provider



2. Record the web consent by checking the *Web Consent Received* box, and adding the consent start date.

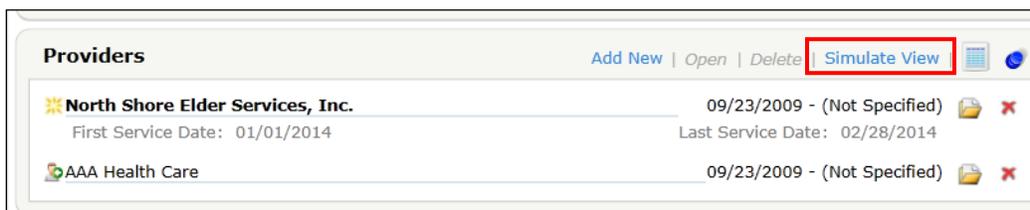


Additional ASAP User Capabilities

Simulate View

The ASAP user can at any time view a consumer's CLP screen, exactly as the authorized HCO sees it, by using the "Simulate View" feature within the consumer's record. To access this view, scroll to the provider section of the consumer's summary page and click on *Simulate View*.

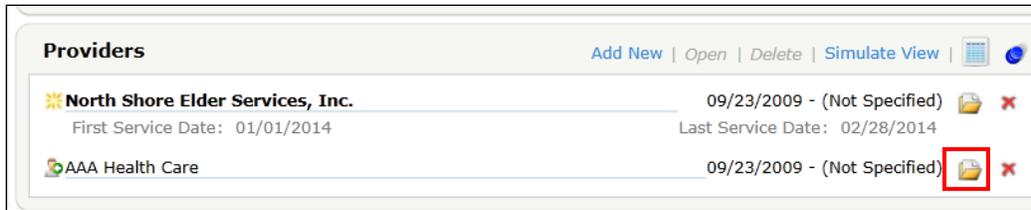
Once the ASAP has assigned a Web Access Provider as shown in the previous section, any consumer can be viewed through the CLP. This can be an essential tool in training staff and promoting the portal to interested HCOs.



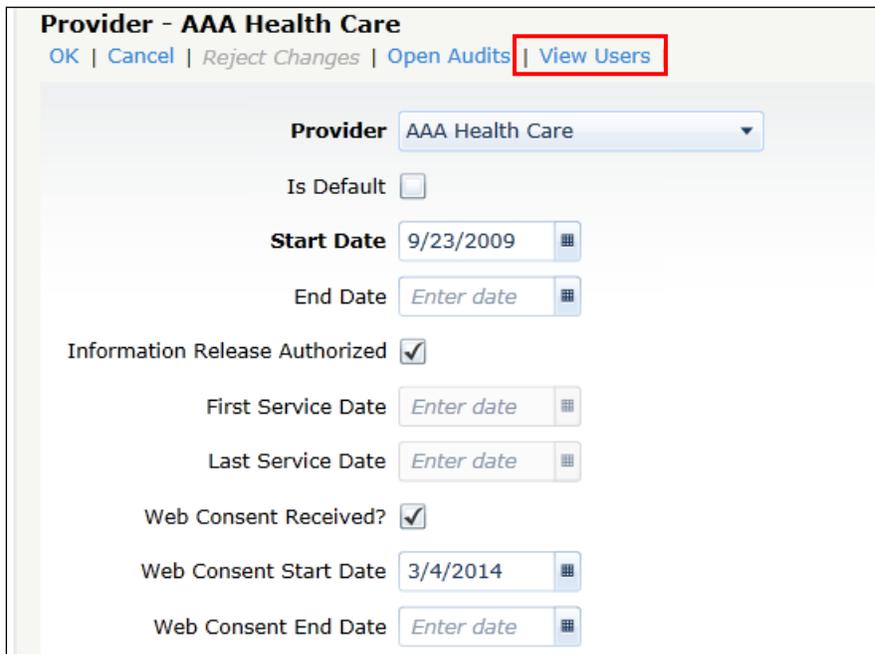
View HCO Users

The ASAP user can also see the CLP users who have access to this Consumer record by opening the provider record from the consumer's summary screen and selecting *View Users*:

1. Open Provider record:



2. Click View Users:



3. Note that custodian information as well as last login date and time is accessible from *View Users*:

Name	Email Address	Last Login	Is Custodian	Is Active
Andrew Ferguson	andrew.ferguson@state.ma.us		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Andy Grigorov	andy.grigorov@massmail.state.ma.us	3/14/2014 9:59:08 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Staffing & resources

ASAP team

As ASAPs assemble their CLP implementation and ongoing internal support teams, they should consider a range of personnel and skill sets. All staff working with consumers should be familiar with the CLP basics: What it is, how access is granted to an HCO, how to use *simulate view*, and where the data elements originate from in SAMS (or where to find this out.) The list below suggests several specific ASAP roles that are important to making the most of CLP:

ASAP Role	CLP Knowledge Area
Information Technology Manager	Understanding of SAMS Administrator set up for CLP providers and new data elements within consumer record. Should be familiar with CLP interface, and be prepared to submit full details on any technical issues encountered by ASAP users.
Interagency Coordinator	Most HCOs will have patients at 2 or more neighboring ASAPs. EOEAs prefer to identify a lead agency for each CLP partnership.
Nursing Manager & Nurse	Awareness of data elements, understanding of specific nursing sections of portal view
Program Manager/Supervisor	Grasp of internal use of CLP: training new and existing staff, updating staff on new features & support issues. Ability to use <i>SAMS Assign/Modify Associations</i> tool
Care Manager/ *Subject Matter Expert	Detailed knowledge of the ASAP user experience, and the ability to assist peers in use of CLP

Partner HCO

The key HCO staff person related to CLP is the Custodian. As noted previously in this guide, the Custodian is the first and primary contact, and is expected to manage users at the organization level.

In addition to the Custodian and the other HCO users who are working directly with consumers, it is beneficial to include managerial staff in a position to inform staff about CLP and promote its usefulness.

It is assumed that an HCO staff person with clinical expertise is also involved in the implementation and use of CLP.

Training

All user guides for ASAP and HCOs are available on the EOEAs CLP website ([http://community-links.800ageinfo.com/.](http://community-links.800ageinfo.com/))

ASAP

Training of the ASAP personnel who manage the initial implementation is provided by EOEAs with the use of demonstrations and the provision of regularly updated written materials. Because of the simplicity of the program's administration, a major training effort is not necessary.

ASAPs are responsible for training their agency CLP end users. This user group includes Care Managers, Nurses, Supervisors, and Program Managers. A good introduction of CLP for this group would include a

walk-through of the *Community Links: ASAP End User Guide*, a projected demonstration of the program, and if possible an assignment to enroll a consumer to an approved HCO. All ASAP users who work with consumer records in SAMS should be familiar with the *Simulate View* feature.

ASAP end users must also understand the tracking system for recording receipt of the updated consent form. This requires adding a web consent confirmation and date to the ASAP provider record within the consumer's summary page. See [Receive and Document Consumer Consent](#) section of this document.

Partner HCOs

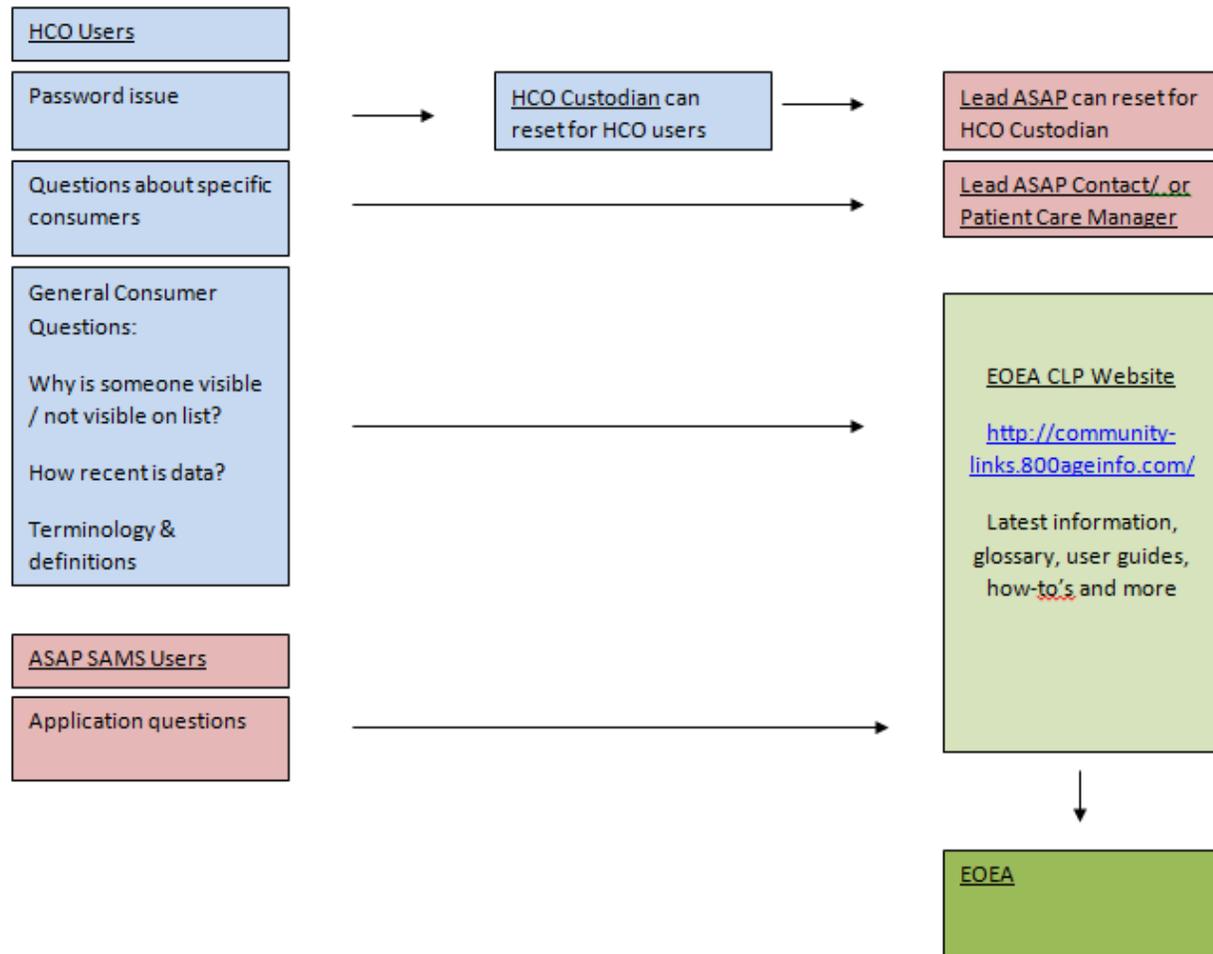
Initial training for HCO staff focuses on the role of the Custodian. Since this person is expected to manage the HCO's users and is the gateway to CLP, their full understanding of how the program works is essential. They can rely on the *Community Links: HCO Companion Guide* to provide them with all the tools they need to fulfill the responsibility of this role.

The Custodian also takes on the role of the in-house trainer for other HCO users. When access to a new user is granted, a thorough review of the consumer data available through the CLP is necessary. HCO end users should also know to contact the Custodian if they are encountering technical difficulties with the site, or need a password reset.

Ongoing Support

Technical support for CLP is structured as shown below. Please note that answers to many support questions can be found on the *CLP Resources Website*: <http://community-links.800ageinfo.com/>

CLP Support Flow Chart



Document History

date	version	description of changes	By
3/19/14	2.0	ASAP task section : removed section on bulk transfer of consumers; added step to identify shared consumers	AG
3/27/14	2.1	Various minor edits; re-sequence of ASAP tasks; added support flow chart; new credentials email screenshot	AG
3/28/14	2.11	Page numbers added	AG
3/31/14	2.12	Minor edits, "care" manager consistent throughout	AG
4/2/14	2.13	Minor edits from Max, revision to support diagram	AG
4/7/14	2.14	Minor edits, re-ordered ASAP tasks	AG

4/9/14	2.15	Added section for consumers who refuse consent for CLP	AG
9/1/15	2.16	Removed outdated section on tracking consumer consent using ASAP as web access provider	AG