Community Links Portal: Professionals

Companion Guide for Health Care Organizations

Document History

date	version	description of changes	By
3/19/14	1.0	First draft	AG
3/28/14	2.0	Support diagram added, branded screenshots added. Page numbers added	AG
3/31/14	2.1	Minor edits, "care" manager consistent throughout	AG
4/7/14	2.2	Support diagram revised	AG

Contents

What is the Community Links Portal?

The *Community Links Portal (CLP)* is a secure web portal that provides an Electronic Health Record (EHR) about some of the Health Care Organization (HCO)'s patients: elders who are receiving Home- and Community-Based Services and Case Management from one of the Massachusetts Aging Services Access points, known as ASAPs, under the auspices of the Executive Office of Elder Affairs (EOEA-(www.mass.gov/elders).

The CLP is a read-only Electronic Health Record (EHR) about your patient (an ASAP's consumers) from the **Registered Nurse** who determines clinical eligibility and **the Care Manager** who authorizes services based on Assessments at Home Visits conducted at least every six months. The information visible on the portal is extracted from the ASAP's consumer database, which is managed statewide by EOEA.

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 CLP professional

Purpose of this Companion Guide

Audience for this document

This Companion Guide is intended for HCO personnel who are involved with the initial implementation of CLP at their organization, and who may provide training and support for users of the application within their HCO.

Objective

The objective of this Companion Guide is to give HCO personnel all the information they need to prepare their staff to begin using *Community Links Portal: Professionals* with their partner ASAPs.

First Connections with your Partner ASAP

Documentation and Resources

Once establishment of a partnership with an ASAP is underway, you can expect to receive an informational packet from the ASAP which includes the following:

- CLP- Implementation Guide for HCOs
- CLP- HCO User Guide: Basic "how to?" guide for day to day CLP users
- Organizational Consent Agreement Form: copy of agreement that must be signed by both parties prior to CLP access
- Program one-sheet: Quick, simple description of CLP with screenshots
- Information on supported web browsers for using CLP

These items and more informational resources can also be found on the EOEA CLP website (http://community-links.800ageinfo.com/)

Discussion & Demonstration

A face to face meeting with the ASAP is an important step in implementation of CLP. Tasks for this meeting include:

- ASAP provides CLP materials & discusses specific data items that are available to view, preferably with a live demonstration of CLP
- Considerations for HCO: How will CLP be used on a day to day basis? Who will be the primary users? What is the organizational structure, and how will that affect user group?
- The ASAP will collect information on lead contacts, staffing capability, and number of potential sites involved in the implementation
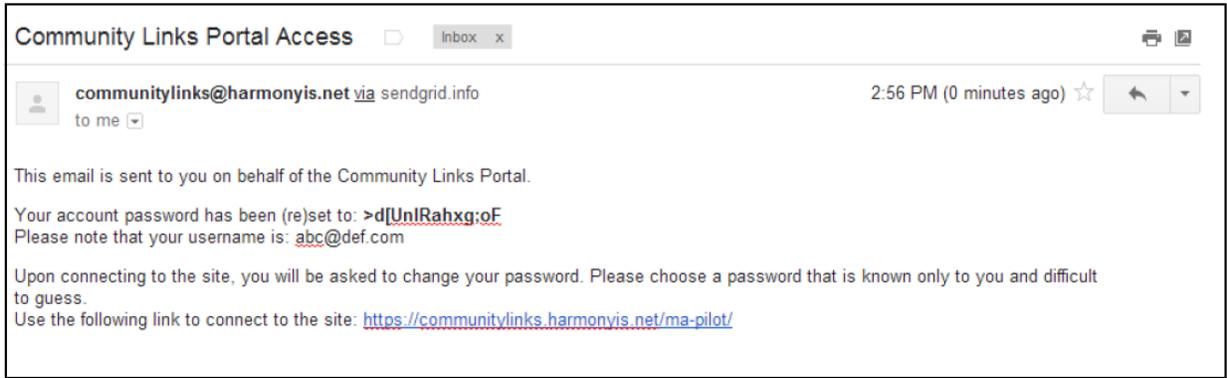
Identifying Shared Patients

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.

The Role of the HCO Custodian

The *Custodian* is the HCO's lead contact, the organization's "gate keeper" for CLP access. This person is responsible for several basic, important tasks.

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

Once all the proper organizational and consumer consents are received and EOEA has given CLP access to an HCO in the consumer database, an email is sent to the Custodian with a link to CLP and a temporary password.
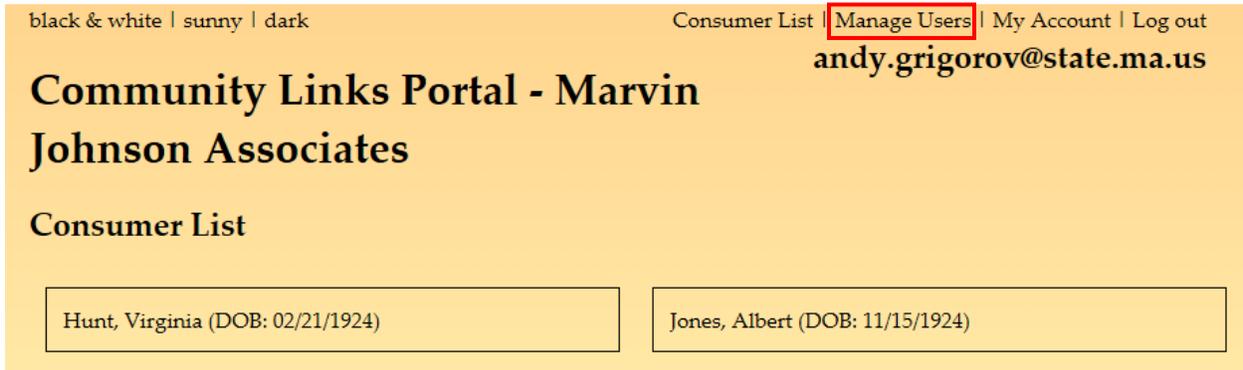
Community Links Portal Access ☐ Inbox x 🖶 🖾

communitylinks@harmonyis.net via sendgrid.info — 2:56 PM (0 minutes ago) ☆ ↩ ▼
to me ▾

This email is sent to you on behalf of the Community Links Portal.

Your account password has been (re)set to: **>d[UnlRahxg:oF**
Please note that your username is: abc@def.com

Upon connecting to the site, you will be asked to change your password. Please choose a password that is known only to you and difficult to guess.
Use the following link to connect to the site: https://communitylinks.harmonyis.net/ma-pilot/

Custodian Manages the HCO Users:

Once successfully logged in, the Custodian has the ability to manage CLP users at the HCO in several ways by accessing the *Manage Users* tool from CLP's main page. Only Custodians will see *Manage Users* as an available option on their CLP homepage.

Adding New Users

1. From the CLP homepage, click *Manage Users*.

black & white | sunny | dark   Consumer List | Manage Users | My Account | Log out
andy.grigorov@state.ma.us

Community Links Portal - Marvin Johnson Associates

Consumer List

| Hunt, Virginia (DOB: 02/21/1924) | Jones, Albert (DOB: 11/15/1924) |

2. This displays a list of your current CLP users. Click *Create New User*

Manage Users

Create New User | Re-send Credentials for all Users

2 active user(s).
3 user(s) can be added.

Is Active	Is Custodian	Name	Email Address	Phone Number	Web Access Type	Action	Credentials Last Sent
☑	☐	AG Test	ag.test.clhp@gmail.com	(617)222-7510	CommunityLinksPortal	Edit | Re-send Credentials	3/21/2014 8:19 AM
☑	☑		andy.grigorov@state.ma.us		CommunityLinksPortal	Edit | Re-send Credentials	2/26/2014 10:17 AM

3. Fill in the new user information. Indicate if this person will also be a Custodian and have the ability to manage users. Double check that the email address is accurate.
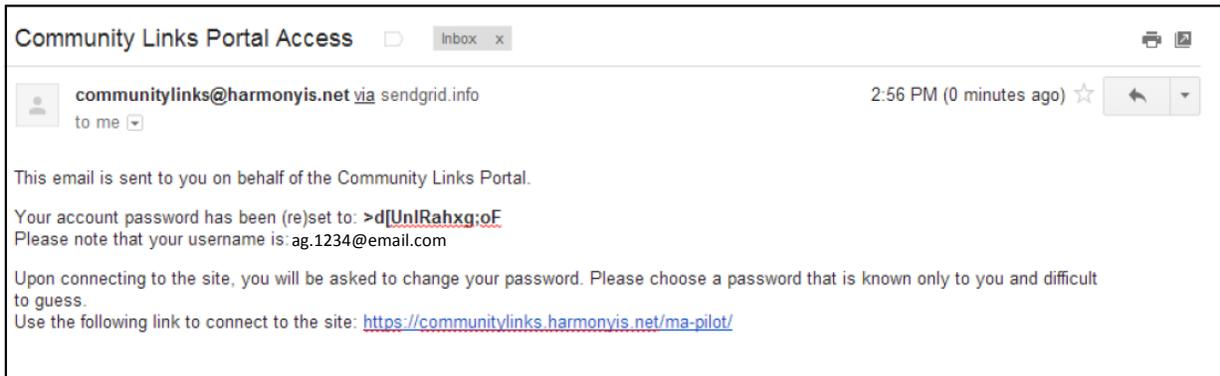
Create New User

Custodian	☐
Name	Andy Tester
Email Address	ag.1234@email.com	← Important- is email address correct?
Phone Number	(617)227-5100
Web Access Type	CommunityLinksPortal ▼

[Create] [Cancel]

Back to List

4. Clicking Create will generate an email to the new user with access information

Community Links Portal Access   ☐   Inbox ✕   🖶 ▣

communitylinks@harmonyis.net via sendgrid.info   2:56 PM (0 minutes ago) ☆ ↩ ▾
to me ▾

This email is sent to you on behalf of the Community Links Portal.

Your account password has been (re)set to: >d[UnIRahxg:oF
Please note that your username is: ag.1234@email.com

Upon connecting to the site, you will be asked to change your password. Please choose a password that is known only to you and difficult to guess.
Use the following link to connect to the site: https://communitylinks.harmonyis.net/ma-pilot/

5. The new user will now be listed on the Manage Users page

Manage Users

Create New User | Re-send Credentials for all Users

2 active user(s).
3 user(s) can be added.

Is Active	Is Custodian	Name	Email Address	Phone Number	Web Access Type	Action	Credentials Last Sent
☑	☐	AG Test	ag.test.clhp@gmail.com	(617)222-7510	PhysicianPortal	Edit | Re-send Credentials	3/21/2014 8:19 AM
☑	☑		andy.grigorov@state.ma.us		PhysicianPortal	Edit | Re-send Credentials	2/26/2014 10:17 AM

Edit User Name, Phone Number, or Status

1. From the Manage Users page, click *Edit* from the Action column for the user you wish to edit

2. Edit as needed. Note that the email address field cannot be edited. Be sure to save your changes.

Re-send Credentials for a Single User or All Users

To re-send credentials (email with temporary password) to a single user, click on Re-send Credentials from the Action column for the selected user.

If you would like to re-send credentials to all users on the user list, click that command located next to Create New User on the Manage User's page.

Manage Users

Create New User | Re-send Credentials for all Users

2 active user(s).
3 user(s) can be added.

Is Active	Is Custodian	Name	Email Address	Phone Number	Web Access Type	Action	Credentials Last Sent
☑	☐	AG Test	ag.test.clhp@gmail.com	(617)222-7510	PhysicianPortal	Edit | Re-send Credentials	3/21/2014 8:19 AM
☑	☑		andy.grigorov@state.ma.us		PhysicianPortal	Edit | Re-send Credentials	2/26/2014 10:17 AM

Staffing & resources

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 EOEA CLP website (http://community-links.800ageinfo.com/.)

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 this 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/

Password issue → HCO Custodian can reset for HCO users → Lead ASAP can reset for HCO Custodian

Questions about specific consumers → Lead ASAP Contact/...or Patient Care Manager

General Consumer Questions:

Why is someone visible / not visible on list?

How recent is data?

Terminology & definitions

→ EOEA CLP Website

http://community-links.800ageinfo.com/

Latest information, glossary, user guides, how-to's and more

↓

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