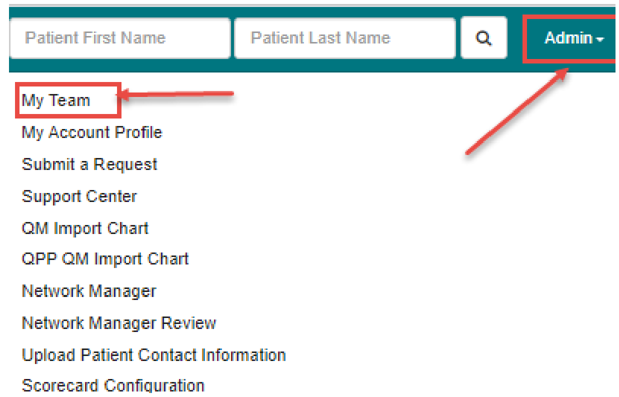
My Team Overview

Step 1

To Access My Team:

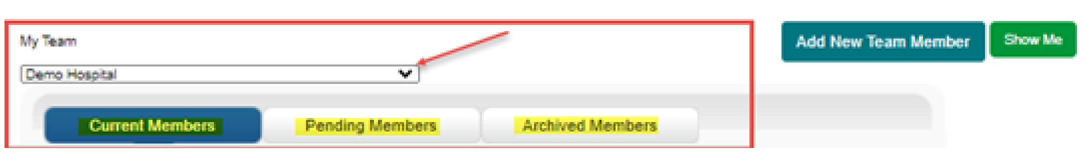
Begin by clicking on the ‘Admin’ drop down and choose **‘My Team’**

Note: ‘My Team’ can only be accessed by users with Security Official Access



The My team page lists all current members in the system at the Master Level by default. Users will be listed in alphabetical order by last name.

You can narrow down your members to a specific practice with the drop down here:

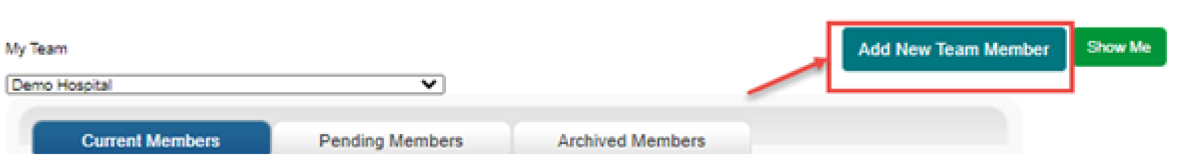


From this screen you can also filter between current, pending, or archived members by clicking on the corresponding tab. Pending are user accounts that have not been activated yet. Usually used when setting up a New Hire and they are not ready for access yet. Archived members are those that have been removed from the Health Endeavors system.

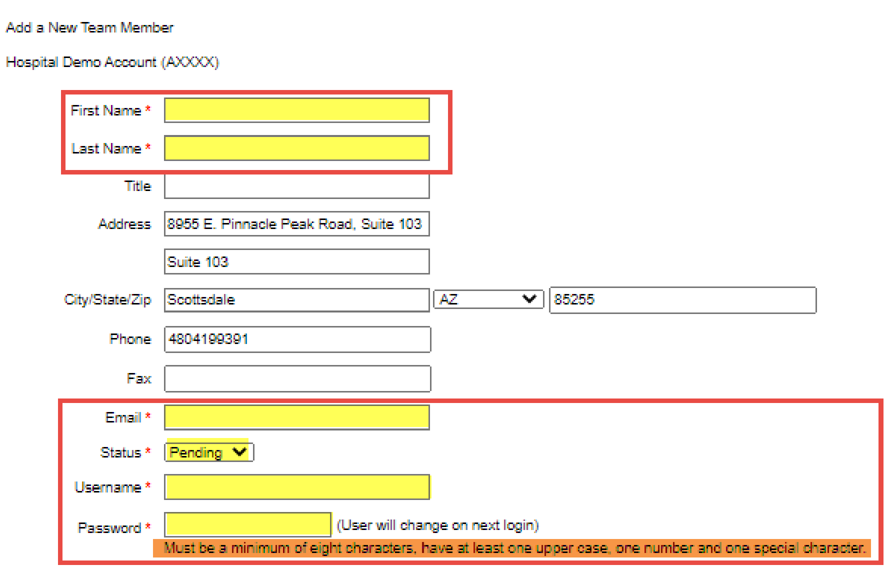
Step 2

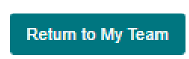
To Add a New Team Member:

For Master Level Users Click on the ‘Add New Team Member’ button. If you are adding a team member that should only have access to a specific practice, choose the practice from the drop-down menu and then click on the ‘Add New Team Member’ button.



Complete the user personal information in the form below. Required fields are marked with a Red *.





Email Address (Each user must have a unique email address. Duplicate email addresses are not acceptable and will cause an error for the user)

Password (Must be a minimum of 8 characters, have at least one upper case letter, one number and one special character)

Status (The status determines what list the user appears in on the My Team page and should be set to ‘Active’ if you wish for the user to have immediate access to the system)

Step 3
User Roles

In this section you will decide what access each user will have in Health Endeavors.

- **Master Account Security Official** – Is the highest in the hierarchy and is an administrative type role. This user will have access to ‘My Team’ to create new users, the QM/QPP import chart and the Network Manager. More than one user may have Security Official access.

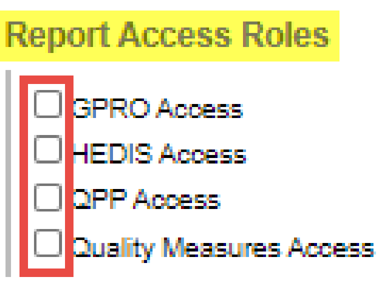
- **Master ACO Default –** This must be checked to give Master Level users access to the Quick Data Tools. This box must also be checked for users that require access to the care coordination tool.

You Will need to choose at least one of the following Patient Population access for each user. If your organization serves multiple patient populations, you may select one or both depending on the access you want for each user.

- **Population Access – ACO (For Medicare)**
- **Population Access – Commercial (for non-Medicare)**

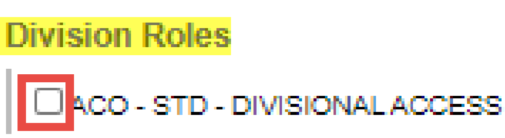
- **Practice Interactive tool** – Check this box to give practice level users access to the drill down options in the analytics dashboard. And Interactive reports under the Analytics tab.

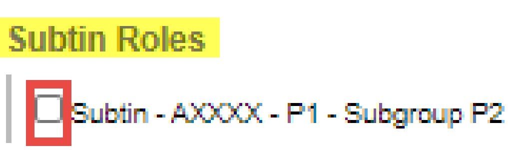
Step 4



If the user you are creating requires access to Quality Measure Reporting, such as GRPO, HEDIS or QPP, you will check the appropriate boxes to the left.

Step 5 (Optional for practice level users only)





If the user requires restriction to a specific Practice, Division, or Sub-TIN complete Step 2 by choosing a practice from the drop down before clicking on the ‘Add New Team Member.’ Then complete Step 3 and 4.

You will also have the option to choose if this user should have access to a specific division(s) or sub-TIN(s).

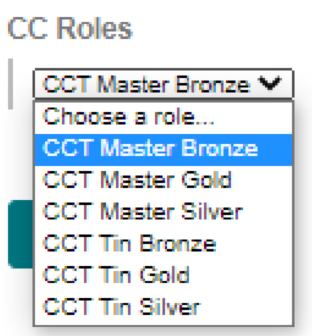
Division role gives the user access to patient data for all practices that are setup under the division that their practice belongs to. (Divisions can be configured in the Network Manager)

Sub-TIN access gives users access to patient data ONLY for NPIs that are associated with the selected sub-TIN(s).

Step 6 (Optional)

CC Roles

If the user requires access to the Care Coordination Tool, you may use the dropdown below to indicate the access role this user will have. The chart below gives details on what access each role provides.



CCT Master Roles are for admin users who have access to all patients within a practice. CCT TIN roles are for admin users who have access to TIN specific patients within a practice.

Master ACO Default must be checked in Step 3 above for **Filter** View access in the Patient Master Dashboard.

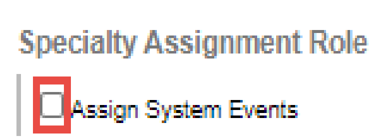
Master Gold Users have full access.
Master Silver Users do not have setup capabilities. Users have access to Care Coordination event actions
Master Bronze Users have view only capabilities.

CCT Master Account Type of Access	CCT Master Gold	CCT Master Silver	CCT Master Bronze
Care			
• Config Panel	✓		
• Manage Templates	✓		
• Template Reports	✓	✓	✓
• Time Report	✓	✓	✓
Patient Master Dashboard			
• Filters View	✓	✓	✓
• Calendar View	✓	✓	
Patient Lookup			
• View Patient Lookup	✓	✓	✓
• Edit Patient Lookup: Patient Contact Details	✓	✓	
• Invite to share button for BB enrollees	✓	✓	
Quality Measure Questionnaire			
• QM action selection (in patient master dashboard)	✓	✓	✓
• View questionnaire	✓	✓	✓
• Input and save questionnaire answers	✓	✓	✓
Care Coordination Events			
• Edit Demographics	✓	✓	
• Edit Insurance	✓	✓	
• View Events (from view events page)	✓	✓	✓
• Create an Event	✓	✓	
• Print Event	✓	✓	✓
• View events (non-editable full event view)	✓	✓	✓
• Edit Event **	✓	✓	
• Close Event	✓	✓	
• Delete **	✓	✓	
• Copy event	✓	✓	
• Mark as Done	✓	✓	
• Add Sub Task	✓	✓	
• Add Follow-up Note	✓	✓	
• Upload Document	✓	✓	✓
• Download Document	✓	✓	✓
• Delete Uploaded Document	✓	✓	
Send patient a text alert enrollment invitation	✓	✓	✓

TIN Account Type of Access	TIN Gold	TIN Silver	TIN Bronze
Care			
• Config Panel	✓		
• Manage Templates	✓		
• Template Reports	✓	✓	✓
• Time Report	✓	✓	
Patient Master Dashboard			
• Filters View	✓	✓	✓
• Calendar View	✓	✓	
Patient Lookup			
• View Patient Lookup	✓	✓	✓
• Edit Patient Lookup: Patient Contact Details	✓	✓	
• Invite to share button for BB enrollees	✓	✓	
Quality Measure Questionnaire			
• QM action selection (in patient master dashboard)	✓	✓	✓
• View questionnaire	✓	✓	✓
• Input and save questionnaire answers	✓	✓	✓
Care Coordination Events			
• Edit Demographics	✓	✓	
• Edit Insurance	✓	✓	
• View Events (from view events page)	✓	✓	✓
• Create an Event	✓	✓	
• Print Event	✓	✓	✓
• View events (non-editable full event view)	✓	✓	✓
• Edit Event **	✓	✓	
• Close Event	✓	✓	
• Delete **	✓	✓	
• Copy event	✓	✓	
• Mark as Done	✓	✓	
• Add Sub Task	✓	✓	
• Add Follow-up Note	✓	✓	
• Upload Document	✓	✓	✓
• Download Document	✓	✓	✓
• Delete Uploaded Document	✓	✓	
Send patient a text alert enrollment invitation	✓	✓	✓

Specialty Assignment Roles – ADT Events*

This option is only available to Gold and Silver CCT users.



Users will have the ability to create ADT events.

*Additional fee applies. Reach out to your account specialist for additional details.

Step 7

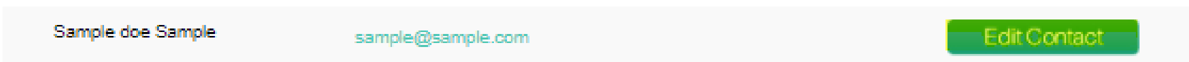
Finalizing User

Once the user is set-up as desired, click the 

button to confirm user creation. If the page does not return to the My Team Current Members page after attempting to save, the user has not been created yet. This is typically because the user's email address or username are already in use.

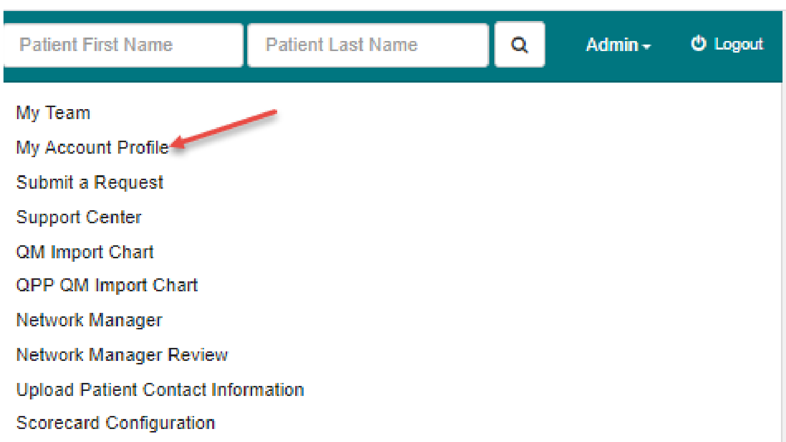
Once a user is in the member list, you may click 'Edit Contact' to make changes to the Roles, manually set their password or Archive a user that you no longer want to have access on Health Endeavors.

Once you create a user will need to send the user their login credentials for access. The system does not auto generate an email to the user with this information.



Notes:

Under the **'Admin'** dropdown, there is a section **'My Account Profile'** that may be accessed by all users.



Using the options in this section, you may view and edit your user profile information or update your password from the 'Password' tab.