

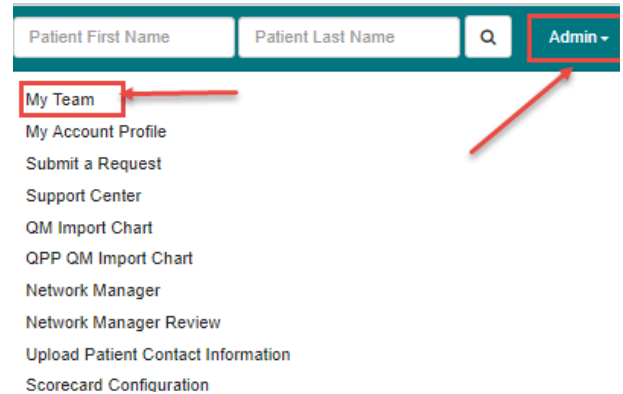
My Team Overview

Step 1

To Access My Team:

Begin by clicking on the 'Admin' drop down and choose 'My Team'

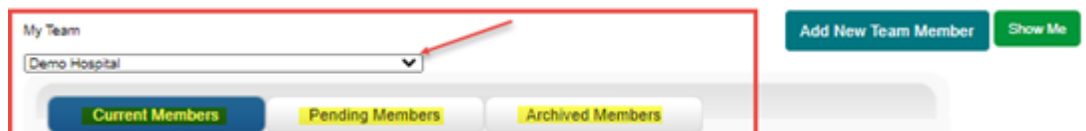
Note: 'My Team' can only be accessed by users with Security Official Access



The screenshot shows the top navigation bar with fields for 'Patient First Name' and 'Patient Last Name', a search icon, and an 'Admin' dropdown menu. The 'Admin' menu is open, showing a list of options: 'My Team', 'My Account Profile', 'Submit a Request', 'Support Center', 'QM Import Chart', 'QPP QM Import Chart', 'Network Manager', 'Network Manager Review', 'Upload Patient Contact Information', and 'Scorecard Configuration'. A red box highlights the 'Admin' dropdown, and a red arrow points to the 'My Team' option.

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:

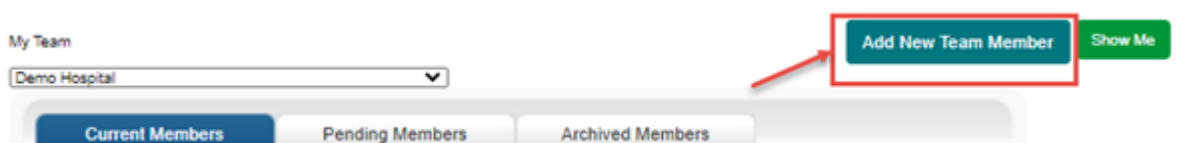


The screenshot shows the 'My Team' page. At the top, there is a dropdown menu labeled 'My Team' with 'Demo Hospital' selected. Below the dropdown are three tabs: 'Current Members' (highlighted in blue), 'Pending Members' (highlighted in yellow), and 'Archived Members' (highlighted in yellow). To the right of the tabs are two buttons: 'Add New Team Member' (blue) and 'Show Me' (green). A red box highlights the dropdown menu, and a red arrow points to the 'Demo Hospital' option.

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.



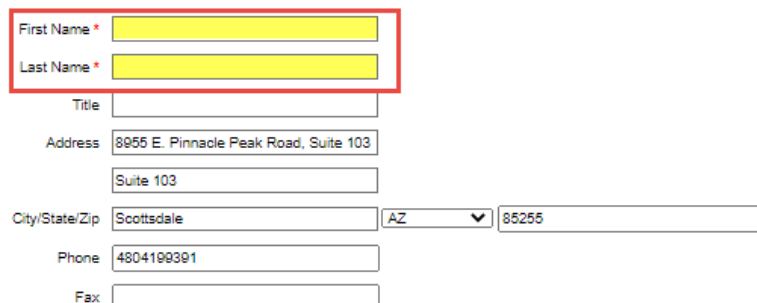
The screenshot shows the 'Add New Team Member' button on the 'My Team' page. The button is blue and labeled 'Add New Team Member'. To its right is a green button labeled 'Show Me'. A red box highlights the 'Add New Team Member' button, and a red arrow points to it.

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

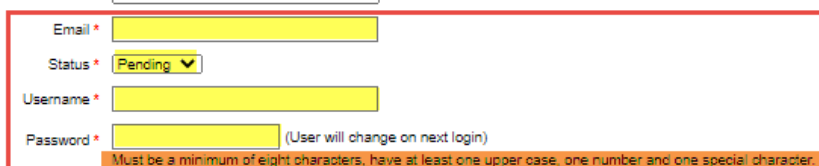
Add a New Team Member

Hospital Demo Account (AXXXX)

[Return to My Team](#)



The screenshot shows the 'Add a New Team Member' form. The form has several fields: 'First Name *' (highlighted in yellow), 'Last Name *' (highlighted in yellow), 'Title' (empty), 'Address' (8955 E. Pinnacle Peak Road, Suite 103), 'City/State/Zip' (Scottsdale, AZ, 85255), 'Phone' (4804199391), and 'Fax' (empty). A red box highlights the 'First Name' and 'Last Name' fields.



The screenshot shows the 'Add a New Team Member' form. The form has several fields: 'Email *' (highlighted in yellow), 'Status *' (Pending, highlighted in yellow), 'Username *' (highlighted in yellow), and 'Password *' (highlighted in yellow). A red box highlights the 'Email', 'Status', 'Username', and 'Password' fields. Below the 'Password' field, there is a note: '(User will change on next login)' and a red box with the text: 'Must be a minimum of eight characters, have at least one upper case, one number and one special character'.

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.

Security Roles

- ☐ Master Account Security Official
- ☐ Master ACO Default
- ☐ Population access - ACO
- ☐ Population Access - Commercial
- ☐ Practice Interactive Tool

- **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

Report Access Roles

- ☐ GPRO Access
- ☐ HEDIS Access
- ☐ QPP Access
- ☐ Quality Measures Access

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)

Division Roles

- ☐ ACO - STD - DIVISIONAL ACCESS

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)

Subtin Roles

- ☐ Subtin - AXXXX - P1 - Subgroup P2

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.

CC Roles



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			

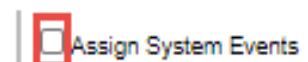
Specialty Assignment Roles – ADT Events*

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.

Specialty Assignment Role



Step 7

Finalizing User

Once the user is set-up as desired, click the **Save** 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.

Sample doe Sample	sample@sample.com	Edit Contact
-------------------	-------------------	---------------------

Notes:

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

Patient First Name	Patient Last Name	Q	Admin -	Logout
--------------------	-------------------	---	---------	--------

- My Team
- My Account Profile
- Submit a Request
- Support Center
- QM Import Chart
- QPP QM Import Chart
- Network Manager
- Network Manager Review
- Upload Patient Contact Information
- Scorecard Configuration

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

My Account Profile

< My Team

Profile	Edit Profile	Password / Questions
---------	--------------	-----------------------------

Use the form below to update your security questions and change your password.

Change Password

Current Password:	<input type="password"/>
New Password:	<input type="password"/>
New Password Again:	<input type="password"/>

Password Complexity Requirements: Must be a minimum of eight characters, have at least one upper case, one number and one special character

Change Password