AssistConnect Best Practices and Standard Operating Procedures

Overview

This Standard Operating Procedure is intended as an overview of the AssistConnect system. AssistConnect is the system for entering Health Insurance Marketplace related outreach. It helps Marketplace Assisters and CMS manage events and capture required reports in a more efficient and collaborative manner.

AssistConnect Licenses

AssistConnect users can have varying levels of access to the system depending on their license type. The chart below outlines the access to the key areas of AssistConnect granted to each license type:

	Navigator Grantee	Navigator Sub-grantee	CMS Program Officer
Enrollment Event- Entered by Navigator Grantee	Create, Edit, Delete, View	View	Edit, View
Enrollment Event- Entered by Navigator Sub-grantee	Create, Edit, Delete, View	Create, Edit, Delete, View	Edit, View

Security in AssistConnect and Passwords

AssistConnect is a cloud-based system that is fully accessible from any computer or mobile device with an internet connection. The link for AssistConnect is: https://assistconnect.force.com/home/home.jsp

The AssistConnect password is a separate password from other systems. When you receive a license for AssistConnect, you receive an email with instructions on setting up your account.

- Passwords expire and must be reset every 60 days
- AssistConnect will automatically log you out after 15 minutes of inactivity. You will be required to re-authenticate to the system after a logout.

If You Forget Your Password

- AssistConnect will disable your account after three failed login attempts.
- Before you get locked out of the system (after second attempt), click on the "Forgot your password?" link and follow the on-screen instructions to reset your password.
- If your account becomes disabled, contact the AssistConnect email box at: AssistConnect@cms.hhs.gov

If You Want to Change Your Password

- To manage your password, click on your name in upper right corner of AssistConnect and click 'MySettings' from the drop down menu. From the screen that appears, click **Security Settings** and you will be prompted to choose a new password.

My Settings

Location Settings
Date, time, and language

Security Settings
User name, password and security
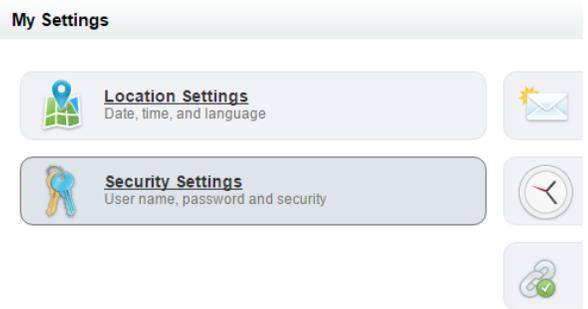
Searching AssistConnect

To get started searching, use the Search Bubble located in the upper left corner of the AssistConnect screen. You can left click once in the box, and then begin typing. As soon as you begin typing, the system will suggest records. This is based on records you've touched previously. If you see what you're searching for among the AssistConnect suggestions, you can just click directly on the record you're interested in to open it.

If the system doesn't make suggestions, or doesn't make a suggestion you're interested in, type the word(s) you're looking for, and click 'Search' to see what it returns.

Search...   Search

TIP: Just like with any other search engine, the more general the information you enter, the more likely you are to return results. Try searching for Address, or sponsor name, as well, if you aren't finding anything by searching for an Event.

TIP: Try using an asterisk ("*") after a partially spelled word to search for every variation of the word. This can help you find records that may have been entered with words spelled differently.

TIP: Once your results display, you can sort them by clicking on a column header (like **Event Date** or **City**). You can also click **Show More** to expand the list.

Marketplace Events (25+)

| Action	Event Name	Event Date	Organization	City	State
Edit	Flyer Distribution	6/20/2016 12:00 PM	United Way of Tucson and Southern Arizona	Tucson	AZ
Edit	Flyer Distribution	6/20/2016 12:20 PM	United Way of Tucson and Southern Arizona	Tucson	AZ
Edit	Flyer Distribution	6/20/2016 1:25 PM	United Way of Tucson and Southern Arizona	Tucson	AZ
Edit	Flyer Distribution	6/20/2016 12:40 PM	United Way of Tucson and Southern Arizona	Tucson	AZ
Edit	Flyer Distribution	6/13/2016 11:45 AM	United Way of Tucson and Southern Arizona	Tucson	AZ

Show More

AssistConnect Event Tracking

AssistConnect is intended to capture two types of records:

- **Marketplace Events:** A Marketplace Event includes any Navigator work performed for outreach, enrollment, or educational purposes. Marketplace events may include, but are not limited to:
    - Providing information and an opportunity for an individual or group of consumers to ask questions about and apply for enrollment in Marketplace coverage;
    - Enrolling consumers in Marketplace coverage;
    - Sharing information necessary for a consumer to make a decision to apply for, or enroll in health coverage through the Marketplace; and/or
    - Educating about Marketplace health coverage and how it works.
- **Marketing/Promotion Activities:** A marketing/promotion activity is any work done by the Navigator organization to raise awareness about the health insurance options available through the Marketplace and the opportunities for assistance to consumer who need help applying.

Steps for Entering a New Marketplace Outreach Record

After logging in to AssistConnect, you can create a new record in one of two ways:

1) Click on the **Create New…** button on the left side of the screen and select **Marketplace Outreach**
2) OR Click on the **Marketplace Outreach** tab in the grey toolbar and click on the **Create New Marketplace Outreach** button when it appears.
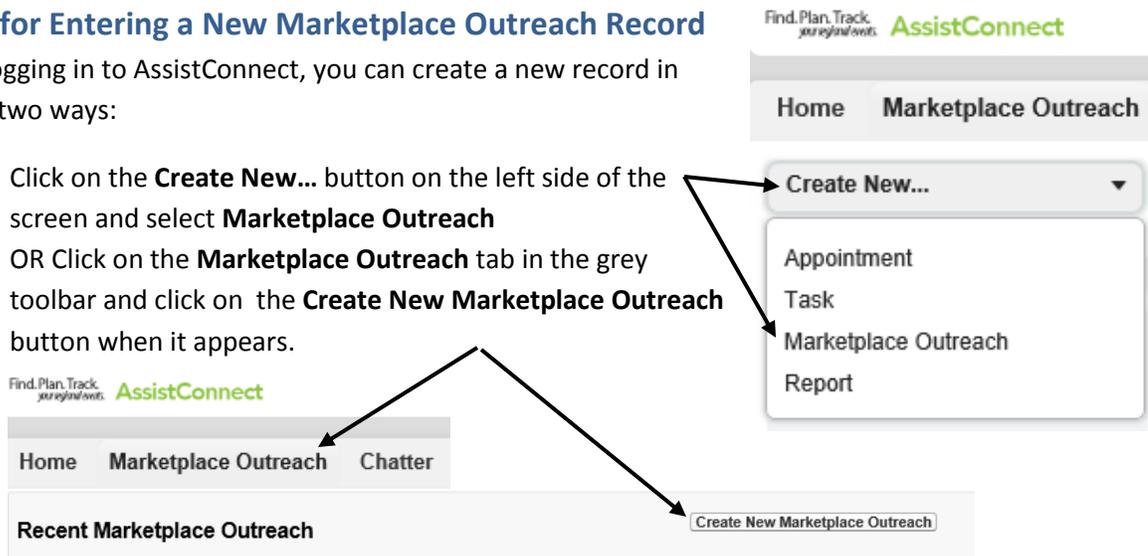
A screen with two checkboxes will appear. Click on the box of the type of record you're entering
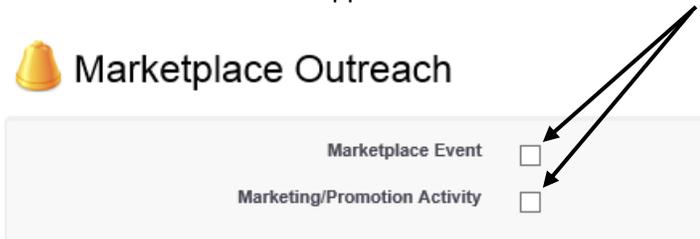
The screen will expand depending on which choice you make. If you make a mistake in your choice, just re-click the checked box to unselect it, and then click on the correct box.

Entering a Marketplace Event

If you are entering a **Marketplace Event**, use the definitions below to guide your entry.

HINT: You may be able to turn on Autofill in your internet browser, which will allow your browser to suggest text based on past entries. This may make entering records easier.

Event Name [Required]: The name of the event you are entering. Especially if an event recurs throughout the year, use enough description to set it apart from other events, i.e. *Delta Lodge Community Christmas Dinner*

Event Date [Required]: A date and time of the event. A "space" must be left between the date and time for it to be accepted by the system. A "space" must also be left between the time and AM/PM for the entry to be accepted. You can click on the underlined date and time to the right of the field to have the current date and time inserted.

Event Location Name [Required]: The name of the location where the activity will take place, i.e., *Houston City Hall*

Street Address [Required]: The street number and name where the activity will physically take place.

City [Required]: The city where the activity will physically take place.

State [Required]: The state where the activity will physically take place.

Zip Code [Required]: The zip code where the activity will physically take place.

Population-Based Activities: If your activity primarily serves specific populations, then you will indicate it here. You can select more than one population as applicable. Note: if your activity is for the general, do not make any selections. To make a selection, click on the appropriate option under **Available**, then select the **Right-facing arrow** button to move it to **Chosen**. You can move multiple values and are not limited to one.

Sponsor/Partner(s): Enter the name of any specific groups you are working with to plan or hold the event. If listing more than one organization, separate with commas.

Event Description [Required]: A brief description of the event that will be useful to people reviewing this event as part of a report. This description should be updated after the activity has occurred to reflect any new information you learned. This new information includes, but is not limited to, environmental scanning, topics covered, composition of audience, etc.

POC Name [Required]: Enter the name of the point of contact from your organization, for the event.

POC Phone [Required]: Enter the phone number of the point of contact from your organization, for the event.

POC Email [Required]: Enter the email address of the point of contact from your organization, for the event.

## Entering a Marketing/Promotion Activity

If you are entering a Marketing/Promotion Activity, use the definitions below to guide your entry.

Activity Name [Required]: The name of the activity you are undertaking, such as……

Activity Date [Required]: A date and time of the activity. A "space" must be left between the date and time for it to be accepted by the system. A "space" must also be left between the time and AM/PM for the entry to be accepted. You can click on the underlined date and time to the right of the field to have the current date and time inserted.

Number of Consumers Targeted [Required]: Enter the number of consumers expected to be reached as part of the activity. Accurate numbers on media reach can be extremely difficult to obtain, so make an estimate based on the information available to you.

Media Type [Required]: Select the mediums you will be using as part of your activity. You can select more than one medium, as applicable. To make a selection, click on the appropriate option under **Available**, then select the **Right-facing arrow** button to move it to **Chosen**. You can move multiple values and are not limited to one.
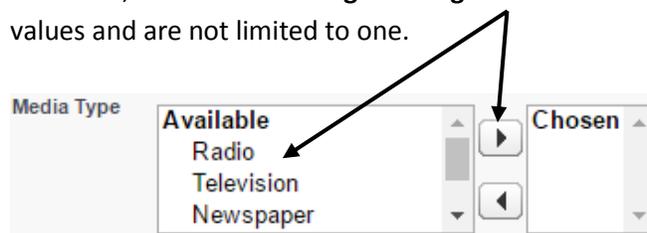
Activity Description [Required]: A brief description of the activity that will be useful to people reviewing this activity as part of a report.

Editing and Deleting Records

Once your entry is Saved, you can **Edit** or **Delete** it. Editing will allow you to change any information that you need to, and Deleting will remove it from the system. You'll find the record either under your **Recent Items** list (on the left side of the screen), in your list of **Recent Marketplace Events**, or by searching for it. Once you have the record pulled up, simply click **Edit** to open it in Edit mode. When you're finishing editing, be sure you click **Save** to save your changes. To delete it, select the **Delete** button.
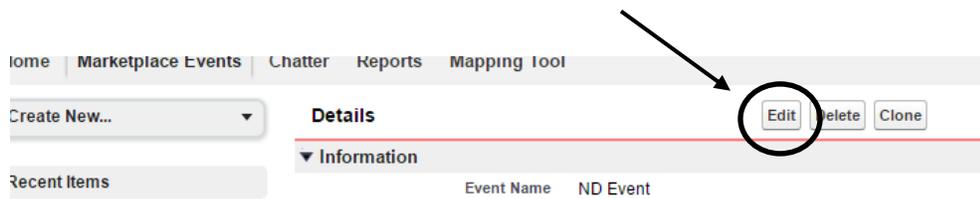
Cloning Records

AssistConenct allows you to clone a record and take advantage of replicating events so you don't have to re-enter information. This can be a good option for events that recur at set intervals, like weekly presentations at a community center. Once an event has been completed, a grey button will appear labeled **Clone**. To clone an Event, click the **Clone** button. The same information from the original record will appear with the exception of a blank **Event Date** or **Activity Date** field, depending on the record type. Fill in the new start date and update any additional information and click **Save** to complete your new record.
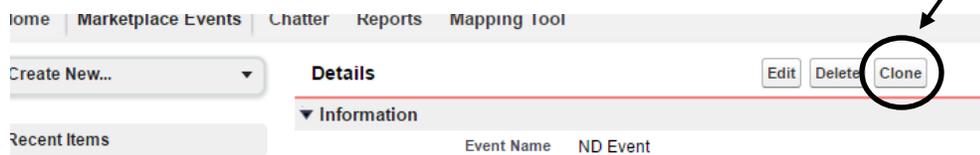
When cloning an event, be careful not to leave information from the original event that is not applicable to the new event, in the record.

Accessing Reports

Opening a Report

Your CMS required report has been set up in the **Reports** tab. To access the report click on the **Reports** tab. Next click in the **AssistConnect Reports** folder under **All Folders** on the left side of the screen. Under the list of reports you will see the report called **Weekly Assister Event Report**. Click on the report name to open the report. You can adjust the report time frame based on your required reporting

period. To adjust the time period, enter the desired dates in the **Time Frame** (**From** and **To**). You will need to adjust this every time you need to run a report.


The **Grantee/Subgrantee Event Report** is also available to you. It is similar to the **Weekly Assister Event Report**, except it includes a column designating if an event belongs to a grantee or subgrantee. This report is for your information only and is not monitored by CMS.

Exporting a Report

You can export reports by clicking on either **Printable View** or **Export Details** and then clicking **Export**. You will need to click **Yes** on the pop-up when Excel opens. From there, you will be able to work with the date in Excel.
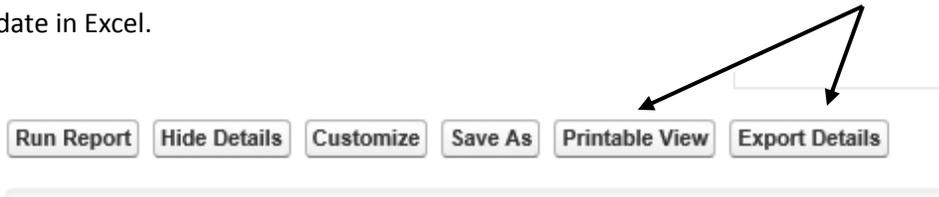
    HINT: Reports usually open in the HTML format. Before saving the spreadsheet, it's usually best to change the File type to an Excel spreadsheet.

Submitting Report to CMS

AssistConnect will automatically submit your weekly report to your Program Officer each Friday. In order to submit a complete report you must enter all events and updates every Friday by 8:00pm EST.