

ImproveCareNow Key Contact Guide

Last Updated: June 2021

Thank you for serving as a Key Contact for your ICN team!

Your role is important! We've worked hard to streamline the Key Contact role as much as possible so that it will not take you much time to fulfill this role. The list of our ImproveCareNow team members who are helping kids with Crohn's disease and ulcerative colitis live better lives must be accurate and regularly maintained.




That's where YOU come in.

Via the ICN Hub platform, Key Contacts help us ensure uninterrupted account access to our secure internal platforms like the Hub and Outcomes Registry. It will also improve the Network's ability to reach the right people with the right information, at the right times.

You can invite new team members to join the ICN Hub. Once they join, they will be added to your team's contact list. From there, you can make updates to current users, delete users, and assign or adjust appropriate user access levels.

You will be reminded every 90 days to review your team's contact list and make any necessary updates – and those changes can also take place at any time through the year.

Key Contact Responsibilities

1. Invite new staff to sign up for the ICN Hub
2. Review center contact list using  **Outcomes Reports**
3. Make updates to staff accounts using  **EasySocial**
 - Update name, email, primary role & ICN role for current center staff
 - Remove staff no longer at your center
4. Manage access to the Outcomes Registry using  **Outcomes**

Working with two systems

EasySocial

- ▶ The “back end” of the ICN Hub
- ▶ Can edit center staff accounts, including:
 - ▶ Name
 - ▶ Email
 - ▶ Profile Type
 - ▶ Primary Role
 - ▶ ICN Role (Key Contact, Physician Lead & Regulatory Contact)

Outcomes Reports

- ▶ Report shows all Hub users in a format similar to the old Contact Management System
- ▶ Report pulls data from the EasySocial platform
- ▶ Can filter by center, primary role & profile

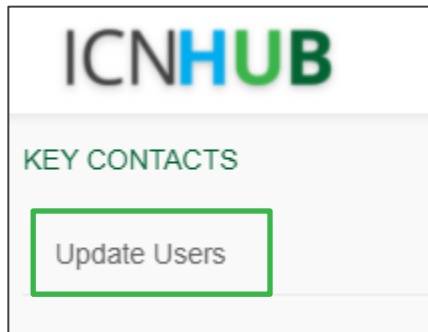
Note: Edits can only be made in the EasySocial platform. Edits cannot be made in Reports. Any edits made in the EasySocial platform will be visible in Reports the following day.

Working with two systems

EasySocial

How to access:

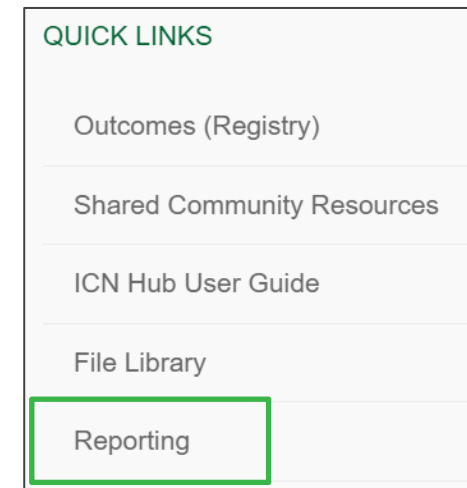
- ▶ Log into the [ICN Hub](#)
- ▶ Select “Update Users” under **Key Contacts** in the left side bar
- ▶ Sign into the [EasySocial](#) platform using your same credentials as the ICN Hub



Outcomes Reports

How to access:

- ▶ Log into the [ICN Hub](#)
- ▶ Select “Reporting” under **Quick Links** in the left side bar




Inviting new staff to sign up for the Hub

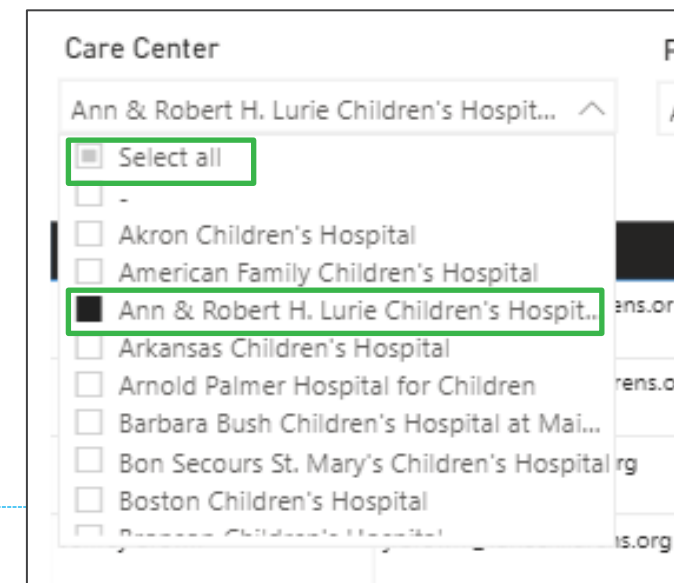
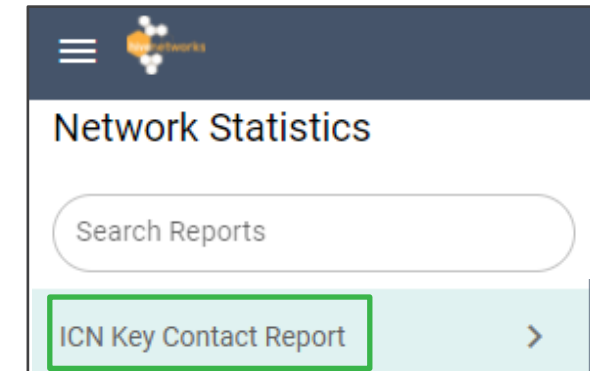
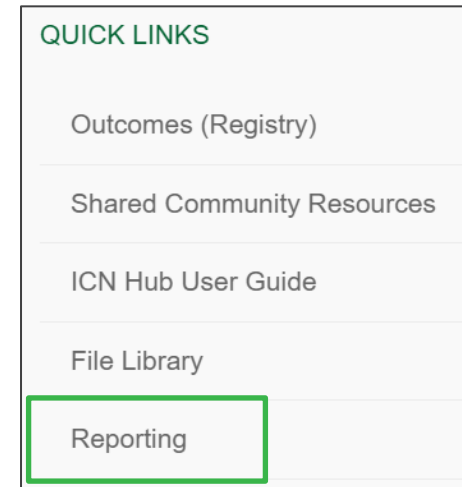
1. Share the registration link with your new staff member:
icnhub.org/index.php/registration
2. Staff at centers should select “Healthcare Professional” as their profile type
3. Have the new staff member fill out the registration form
 - For security purposes, staff should sign up with their **professional** email address
 - Staff should select the Care Center they are part of
 - Use the **Activation Code BETTERTOGETHER**
4. A confirmation email will be sent to their email to activate their account. New staff must activate their account before accessing the Hub for the first time.

Review Center Contact List



Use *Outcomes Reports*

1. Log into the [ICN Hub](#)
2. Select “Reporting” under **Quick Links** on the left side bar
3. Select “ICN Key Contact Report” on the left side bar
4. Filter the list by your Care Center
 - Unselect “Select All” and then select your center
5. Review staff list. If accounts need to be updated or removed, go to the  **EasySocial** platform (see next page).



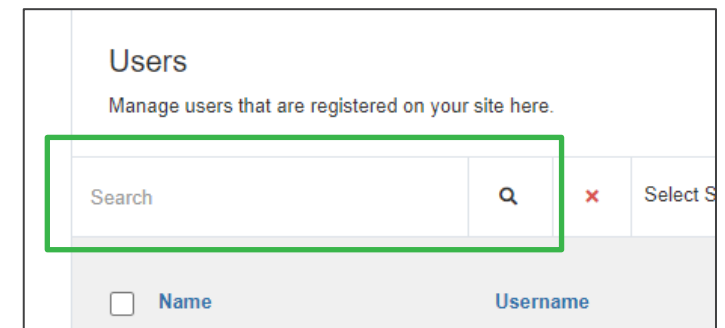
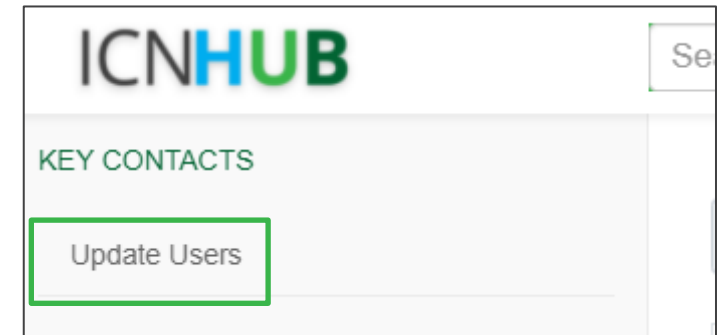
Make Updates to Staff Accounts



Use *EasySocial*

- ▶ Log into the [ICN Hub](#)
- ▶ Select “Update Users” under **Key Contacts** in the left side bar
- ▶ Search by staff member’s name in the Search field

Follow the steps on the next slides to make the appropriate edits to staff accounts →



Make Updates to Staff Accounts



Use EasySocial

>> Update Name & Email

1. Select the user's Name to open their profile
2. Update their name and/or email as needed
 - *For security purposes, all center staff should be registered with their professional emails, not personal emails.*
3. Select "Save"

Kim Shelly	Q
<input type="checkbox"/> Name	Username
<input type="checkbox"/> Kim Shelly	kashelly@iu.edu

Save Save & Close Save & New Cancel

Dashboard
Users
Users
Profile Types
Pending
Download Requests
Banned
Verification
Export
Import

Kim Shelly (Healthcare Professional)

You may update the user's details using the form below.

Profile User Groups Achievements Points Notifications Privacy

Basic Information	Account
Credentials	How should we identify you on the site? * Name: Kim Middle Name Shelly <small>Note: Please enter your name.</small>
Appearance	* Password: Password Reconfirm Password <small>Note: Password must be eight (8) symbols.</small>
Details	* Email: kashelly@iu.edu
Interests	
Specialties	
Affiliations/Associations	
Account Setting	

Make Updates to Staff Accounts



Use EasySocial

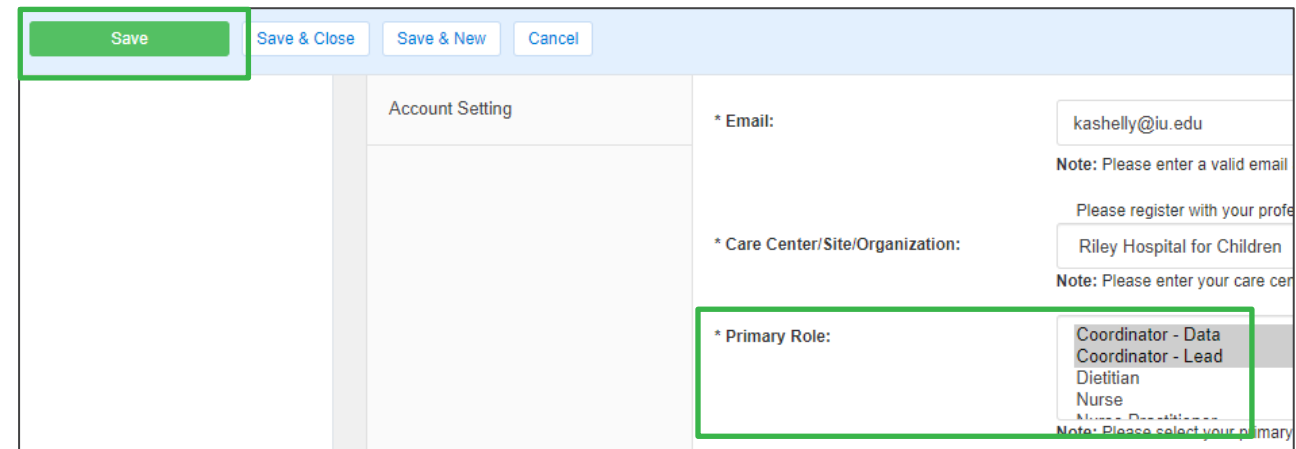
>> Update Primary Role

1. Select the user's Name to open their profile
2. Select the Primary Role that best reflects the staff member's role.
 - *If the staff member has more than one role, use the Ctrl button to select all applicable roles.*
3. Select "Save"



Kim Shelly

<input type="checkbox"/>	Name	Username
<input type="checkbox"/>	Kim Shelly	kashelly@iu.edu



Account Setting

* Email:
Note: Please enter a valid email

* Care Center/Site/Organization:
Note: Please enter your care center

* Primary Role:
Coordinator - Lead
Dietitian
Nurse
Note: Please select your primary role

Save Save & Close Save & New Cancel

Make Updates to Staff Accounts



Use *EasySocial*

>> Update ICN Role

1. Select the user's Name to open their profile
2. Select the ICN Role(s) that staff member holds
 - *If adding or removing someone as your center's Key Contacts, follow steps on next page →*
3. Select "Save"

The screenshot shows a user profile update interface. On the left, a search bar contains the text "Kim Shelly" and a search icon. Below it, a list of users is displayed with columns for "Name" and "Usernam". The user "Kim Shelly" is selected, and their name is highlighted with a green box. On the right, the "ICN Role" section is visible, with three checkboxes: "Key Contact" (checked), "Regulatory Contact" (checked), and "Physician Lead" (unchecked). The "Save" button is highlighted with a green box. Below the checkboxes, a note reads: "Note: Select any ICN roles this user fills."

Note: Every center must have at least one Physician Lead, one Regulatory Contact, and two Key Contacts. Users identified in these groups may receive additional emails periodically.

Make Updates to Staff Accounts



Use *EasySocial*

>> Update ICN Role – Key Contacts

If you are adding or removing a staff member as a Key Contact for your center, follow these additional steps:

1. Update their ICN Role in the profile tab (see previous page)
2. Select the “User Groups” tab
3. Check the Key Contacts User Group for new Key Contacts or remove the check for users that will no longer be Key Contacts
4. Select “Save”

Save Save & Close Save & New Cancel

Dashboard Users Users Profile Types Pending Download Requests Banned Verification Export Import

Kim Shelly (Healthcare Professional)
You may update the user's details using the form below.

Profile **User Groups** Achievements Points

Assigned Users Group
Here you may define which user group this user belongs to. This does not

Default Joomla User Groups

<input type="checkbox"/>	Public
<input type="checkbox"/>	Guest
<input type="checkbox"/>	Manager
<input type="checkbox"/>	Administrator
<input checked="" type="checkbox"/>	Key Contacts

Make Updates to Staff Accounts



Use *EasySocial*

>> *Update ICN Role – Key Contacts*

If you are adding or removing a staff member as a Key Contact for your center, follow these additional steps:

5. Email info@improvecarenow.org to have the user be added or removed as a Site Admin in the Outcomes Registry.
 - *A Site Admin is able to manage Outcomes Registry permissions for their ICN team at their center*

Note: *At this time, a Key Contact/Site Admin cannot grant Site Admin permissions to other users at their site. This will be implemented soon.*

Make Updates to Staff Accounts



>> Remove center staff

1. Select the box next to user's Name
2. Select "Ban" on the top navigational bar
 - **Do NOT select Delete.** If you delete a user, all the posts, content, and resources shared by the user will be permanently removed from the Hub.
 - Once banned, the user will have an "x" under the Enabled field.
 - Banning a user will remove their access to the Hub and Outcomes Registry.

<input type="checkbox"/>	Name	Username	Last Visit Date ▲	Profile Type	Type	Enabled
<input checked="" type="checkbox"/>	Kim Shelly	kashelly@iu.edu	2021-06-08 18:08:01	Healthcare Professional	✕	✕

Make Updates to Staff Accounts



Use *EasySocial*

Note: When in the *EasySocial Platform*, please **ONLY** make edits to the features outlined in the previous pages. **DO NOT** make edits in other areas of the platform.

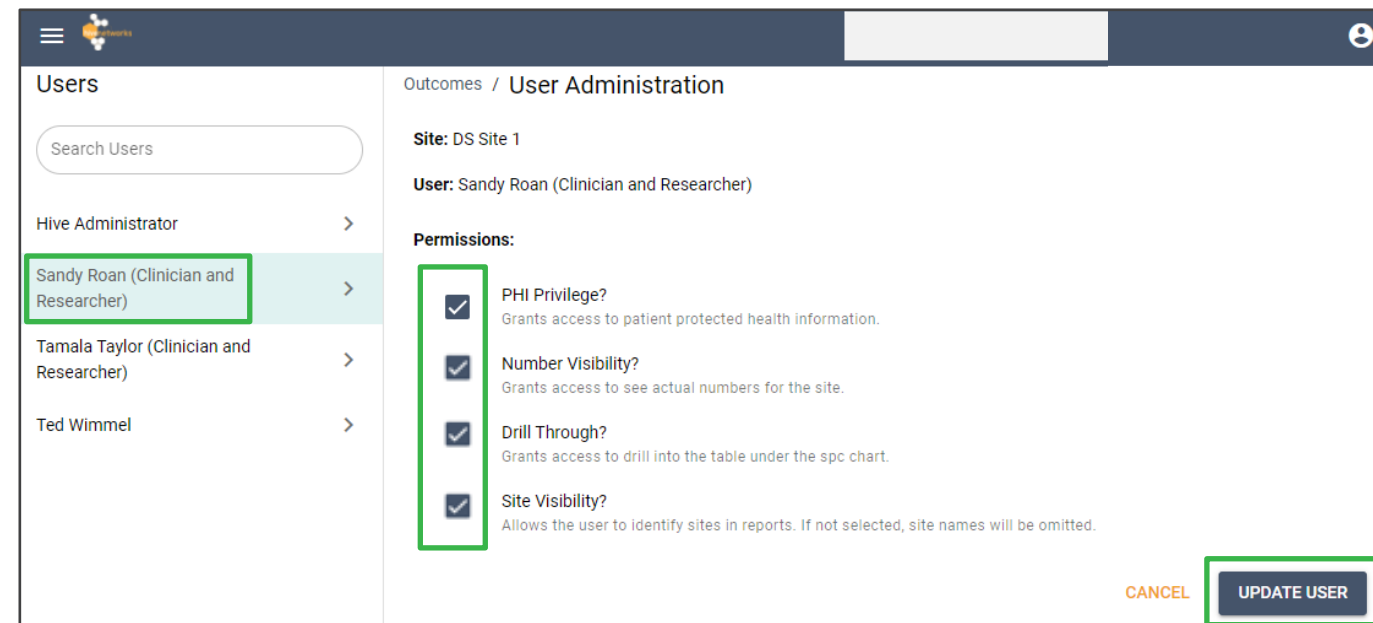
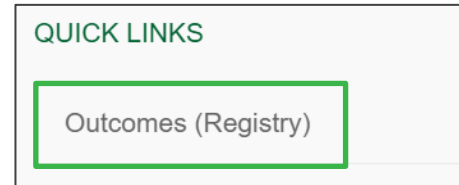
The screenshot shows a user profile page with several sections. A red box highlights the top navigation tabs: Profile, User Groups, Achievements, Points, Notifications, and Privacy. A red 'X' is placed over the 'Achievements' tab. Another red box highlights the left sidebar menu: Basic Information, Credentials, Appearance, Details, Interests, Specialties, Affiliations/Associations, and Account Setting. A red 'X' is placed over the 'Credentials' menu item. A third red box highlights the 'Account' section, specifically the 'Name' and 'Password' fields. A red 'X' is placed over the 'Password' field. The 'Name' field contains 'Kim' and 'Shelly'. The 'Password' field contains 'Password' and 'Reconfirm Password'. The 'Email' field contains 'kashelly@iu.edu'. A note below the password field states: 'Note: Password must be eight (8) characters.' A note above the name field states: 'Note: Please enter your name.'

Grant Access to the Outcomes Registry



Use *Outcomes*

1. Log into the [ICN Hub](#)
2. Select “Outcomes (Registry)” under **Quick Links** in the left side bar
3. Select “User Administration”
4. Select the user in the left side bar
5. Check all four permission boxes
 - **PHI Privilege** allows the user to see, add, and update patients.
 - **Number Visibility, Drill Through, and Site Visibility** relate to how much information a user can see within reports.
 - *More details will be added here later. It is probably best to check all for now, as this layer of granularity is new to the network.*
6. Select “Update User”



Access for Research Studies

Additional permissions for research studies (such as COMBINE) will be added to individual sites by Hive Admins.

At this time, anyone at a site who has PHI access will also have access to the study forms and can add patients to the study once it has been added to the site.

Note: *At this time, limiting access to study forms to specific users at a site is not available. This will be implemented soon.*

Thank you for being a Key Contact!

If you have any additional questions, please reach out to info@improvecarenow.org.

