

Introduction to CommunityCare NB Partner Portal

SERVICE PROVIDERS



Community Care **NB**
Soins Communautaires

| USER GUIDE |

Version 0.5

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NEW •

CONFIDENTIAL STATEMENT

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Version & Document Control Table

This version control table provides historical data about each update made to a document. It is useful to include the author, date and notes about each change made to refer back to what these changes were.

Version Control			
Version	Edited	Date	Changes
0.1	Amy Michaud	04/03/2024	First Draft
0.2	Amy Michaud	07/25/2024	Reviewed and edited content/ reformatted /added versions and confidential statement
0.3	Amy Michaud	09/17/2024	Reformatting / updated screenshots / removed unrelated functionality and icons / removed details about service confirmation tab / Removed CommunityCareNB abbreviations.
0.4	Amy Michaud	09/20/2024	Multi-Factor Authentication steps and video added.
0.5	Amy Michaud	11/12/2024	Updated screenshots with new UI and added columns / Logout

MODULE A1 – INTRODUCTION TO COMMUNITYCARENb

PURPOSE: Become familiar with the background and concepts of the CommunityCareNB Partner Portal platform.

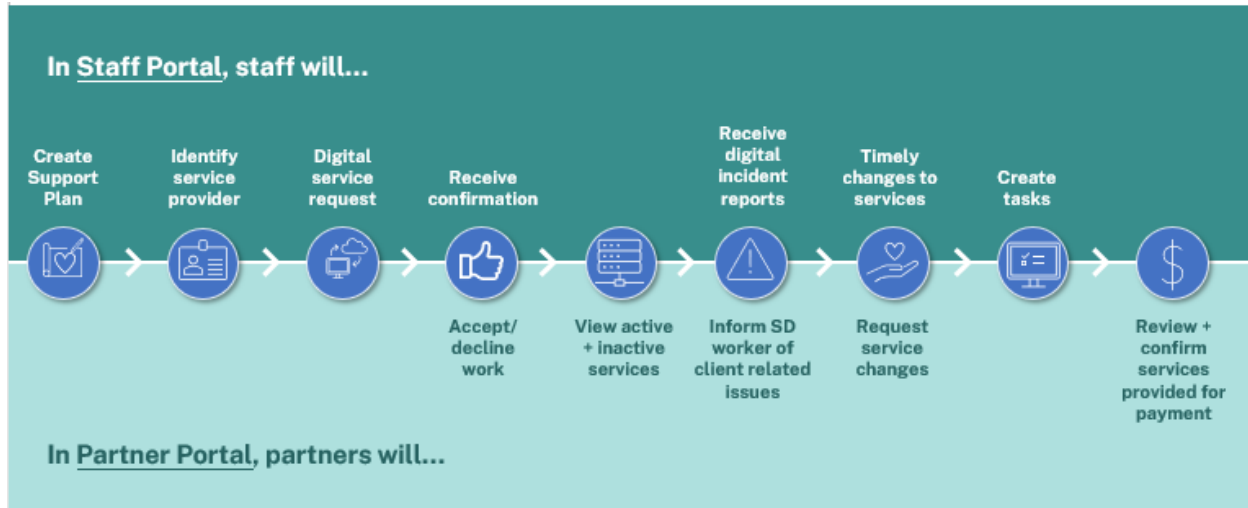
What is CommunityCareNB?

CommunityCareNB is the new care management system for Social Development and Service Providers that will aid in supporting clients. CommunityCareNB has multiple portals: **Employee Portal, Partner Portal, and Person Portal**. Within each of these portals are specific personas that are based on the responsibilities of the employee or service provider, meaning that each individual that logs into CommunityCareNB will have access to information that pertains to their specific job role (e.g., a finance user from a service provider will only be able to see relevant payment related information from a requisition and will not see incident reports, notes or tasks related to clients that SD staff have documented in the Employee Portal).

Overtime, CommunityCareNB will be used for the administration and delivery of all Social Development services and programs. CommunityCareNB will replace all NB Families, NB Case, contact lists, vendor lists, and more.

How SD Staff & Service Providers are Linked

The following is a summary of the tasks that will be completed in CommunityCareNB and how the work of SD staff and service providers is related.



What do I need to get started?

All you will need is an internet connection. Social Development will provide Service Providers access to CommunityCareNB by creating a User Account and assigning each user with ONE persona that is based on their roles and responsibilities.

There are currently three types of personas (user access types) that Service Providers can be given. A Persona is a set of permissions in CommunityCareNB that provide and/or limit users' access to information or actionable items.

The following are the three types of persons (user access types) that a user can be given:

- **Financial:** the person(s) responsible for submitting invoices, ensuring payment for services.
- **Care Coordination:** the person(s) who receives service requests and confirms services, who submit incident reports and who would communicate with Social Development about an active client (e.g., request changes).
- **Financial & Care Coordination:** the person responsible for both financial and care coordination. This is common among service providers with fewer administrative staff.

Partner Portal Notable Features


In CommunityCareNB you will now:

- Receive and respond to service requests (approve or decline).
- Standardized Digital incident reports from the requisition sent directly to the right worker.
- Incident Reports and Observed Changes are logged separately.
- Ability to request a change in service (adjust pause, stop) connected to the client's service
- All information is stored and accessed in one place.
- Primary SD Worker is visible and updated when changed.
- Information will auto-populate, reducing errors and ensuring that the correct information is received by the appropriate person.
- Maintains a permanent record (current and historical) of all service requests, incident reports, or communications related to a client and their case.

Keeping New Brunswickers' Information Safe

The Department of Social Development and our Partners have a responsibility and have been entrusted with ensuring that all clients' personal information is kept secure and confidential. The following are a items that should be known and upheld to keep client information secure.

Access:

- Username and passwords are never to be shared with any other person. Employees are responsible for all activities conducted using their login credentials. It is **CRITICAL** to notify SD of any change in staffing, new staff who require access, staff who should no longer have access.
- Given the sensitive information, any device that accesses CommunityCareNB should be password protected.
- Only access CommunityCareNB from a secure location (i.e., where the public or others cannot see the information displayed on the screen).
- Computer and laptop screens should be locked when not in use or when stepping away from your work area. (e.g., Windows Key  + L)

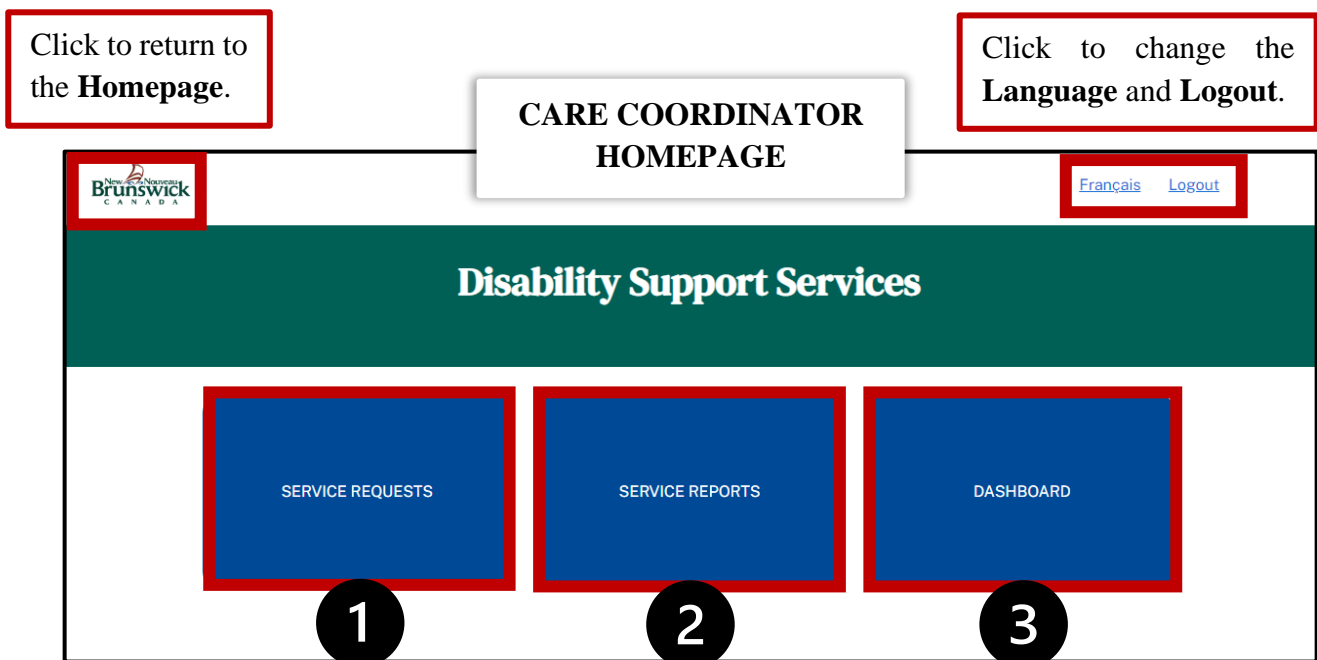
Confidentiality:

- Information must never be stored on external devices (i.e., USB flash drives or external hard drives).
- If printed, the documents must be properly disposed of by shredding.
- Client and/or Case information must never be discussed in public locations.

Navigating Partner Portal

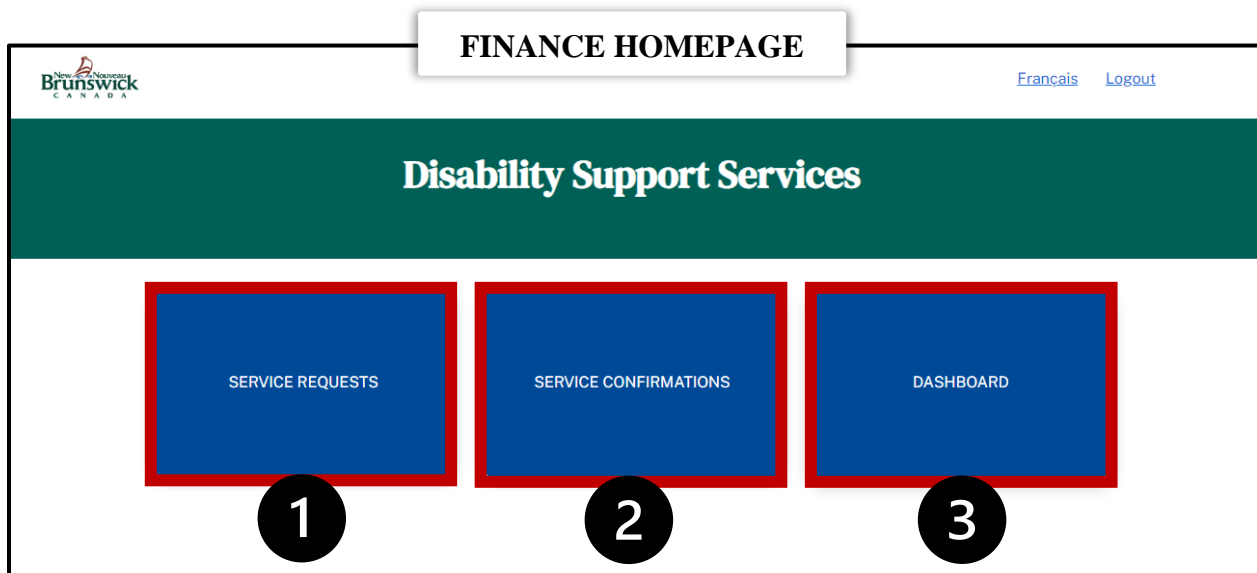
Homepage Overview

The homepage is based on the access and permissions granted to each CommunityCareNB user to manage and receive information related to your user type (e.g., Care Coordination, Finance or Care Coordination and Finance). The following images outline the Care Coordinator and Finance



user type homepages. Those with the Care & Finance persona will have visibility of all tiles presented in the following two images. To learn more about the tasks and functions for these user types, refer to their aptly named modules (A2 – Care Coordination & A3 - Finance).

1. **Service Requests:** In this section you will find **Pending (new), Active, Terminated, Connected,** and **Cancelled** Service Requests. This area of the portal is where you will review, accept or decline service requests as well as report an incident, share an observable change, or request changes to services.
2. **Service Reports:** Selecting this tile will open the Service Report history window. From here, you can access all Incident Reports, Observable Changes, and Change Requests for clients receiving or have received services.
3. **Service Request Dashboard:** The **Dashboard** displays reports related to new service requests (last 30 days), expiring service requests (next 30 days), as well as all activated and terminated service request. Reports can be displayed and exported.



1. **Service Request:** Selecting this tab will open a new window containing **Active** and **Terminated** service requests. This area of the portal is where you will access client and service information and log a change request. To protect clients' privacy, not all details of service requests are visible to the financial user type, as this information is not required for payment related tasks.

2. **Service Confirmations:** Selecting this tab will open the service confirmations window, where you will be able to create and access draft, uploaded, validated and submitted service confirmations (i.e., previously referred to as invoices).
3. **Service Request Dashboard:** The **Dashboard** displays reports related to new service requests (last 30 days), expiring service requests (next 30 days), as well as all activated and terminated service request. Reports can be displayed and exported.

Service Request Overview (Care Coordinator)

When the Service Request tab is selected, the following tabs are displayed:

- **Pending:** A list of offered Service Requests that require the user to accept or deny.
- **Active:** A list of all **Accepted** and **Activated** service request records (i.e., SD Worker has activated the request, which signals the beginning of services and allows you to log service reports).
- **Terminated:** A list of **Terminated** (inactive) service request records.
- **Connected:** A list of Service Request with a direct link to the original and recently modified record. This list is used to track which service requests have been modified and for confirming services against the correct record and time period.

- Cancelled:** A list of **Cancelled** Service Requests. These records are no longer available to be logged or billed against. Any services offered must stop.

PENDING

[Français](#) [Logout](#)

Disability Support Services

[PENDING](#) [ACTIVE](#) [TERMINATED](#) [CONNECTED](#) [CANCELLED](#)

My Pending Services Requests

2 items • Sorted by Service Name • Filtered by All orders - Status, Order Record Type • Updated a few seconds ago

	Order...	Account Name	Order ...	Sta...	Service Name ↓	Zone	
1	00000247	Manoj Tester	2024-11-04	Offered	Home Support/Personal Care - Souti...	Zone Southwest	
2	00000210	Tiffany Allison Corb...	2024-06-01	Offered		Zone Southwest	

ACTIVE

[Français](#) [Logout](#)

Disability Support Services

[PENDING](#) [ACTIVE](#) [TERMINATED](#) [CONNECTED](#) [CANCELLED](#)

My Active Service Requests

18 items • Sorted by Service Name • Filtered by All orders - Status, Order Record Type • Updated 13 minutes ago

	Order...	Account Name	Order S...	Status	Service Name ↓	Zone	Service Center	
1	00000217	Manoj Tester	2024-01-01	Activated	Home Support/P...	Zone Southwest	Saint John / Sain...	
2	00000224	Frederick Flintst...	2024-09-01	Accept...	Home Support/P...	Zone Southwest	Saint John / Sain...	
3	00000138	Tiffany Allison C...	2024-06-01	Activated		Zone Southwest	Saint John / Sain...	

TERMINATED

[Français](#) [Logout](#)

Disability Support Services

PENDING ACTIVE TERMINATED CONNECTED CANCELLED

My Terminated Service Requests

5 items • Sorted by Service Name • Filtered by All orders - Status, Order Record Type • Updated a few seconds ago

	Order...	Account Name	Order S...	Order E...	Status	Service Name ↓	Service Center
1	00000222	Smith Tester Patri...	2024-08-10	2024-09-24	Terminated	Home Support/P...	St. Stephen / Sain...
2	000002...	Lillian Marie Mars...	2024-09-01	2024-10-31	Terminated	Home Support/P...	Saint John / Saint ...

CONNECTED

[Français](#) [Logout](#)

Disability Support Services

PENDING ACTIVE TERMINATED CONNECTED CANCELLED

My Connected Services Requests

0 items • Sorted by Original Service Request • Filtered by All orders - Order Record Type, Original Service Request • Updated a few seconds ago

When a service request is modified, a new cloned service request with the new changes is created. No activated/terminated service request can have an overlap of service period with the respective cloned service request created. Any new service confirmations where the service period is on or after the effective date need to be created for the new cloned service request instead of original service request. And any service confirmations for the time period before the effective date need to be created for the original service request.

Original ... ↑	Order Nu...	Account N...	Order Sta...	Service N...	Zone	Service C...
----------------	-------------	--------------	--------------	--------------	------	--------------

NEW

CANCELLED

[Français](#) [Logout](#)

Disability Support Services

PENDING ACTIVE TERMINATED CONNECTED CANCELLED

My Cancelled Services Requests

2 items • Sorted by Order Number • Filtered by All orders - Status, Order Record Type • Updated 9 minutes ago

	Ord... ↑	Service Name	Account Name	Status	Zone	Service Center
1	00000174		Tiffany Allison Corb...	Cancel...	Zone Central	Fredericton / Frederict...
2	00000219	Home Support/Person...	Manoj Tester	Cancel...	Zone Southwest	Saint John / Saint John

NEW

Service Request Overview (Finance)

When the Service Request tab is selected, the following tabs are displayed:

- **Active:** A list of all **Accepted** and **Activated** service request records (i.e., SD Worker has activated the request, which signals the beginning of services and allows you to log service reports).
- **Terminated:** A list of **Terminated** (inactive) service request records.
- **Connected:** A list of Service Request with a direct link to the original and recently modified record. This list is used to track which service requests have been modified and for confirming services against the correct record and time period.
- **Cancelled:** A list of **Cancelled** Service Requests. These records are no longer available to be logged or billed against. Any services offered must stop.

ACTIVE

[Français](#) [Logout](#)

Disability Support Services

ACTIVE
TERMINATED
CONNECTED
CANCELLED

My Active Service Requests

18 Items • Sorted by Order Number • Filtered by All orders - Status, Order Record Type • Updated a few seconds ago

	Ord... ↑ ↓	Account Name	Order S...	Status	Service Name	Zone	Service Center
1	00000138	Tiffany Allison C...	2024-06-01	Activated		Zone Southwest	Saint John / Sain...
2	00000139	Tiffany Allison C...	2024-06-11	Accept...		Zone Southwest	Saint John / Sain...
3	00000141	Susan Barbara ...	2024-06-15	Activated		Zone Southwest	Saint John / Sain...

TERMINATE

[Français](#) [Logout](#)

Disability Support Services

ACTIVE
TERMINATED
CONNECTED
CANCELLED

My Terminated Service Requests

5 Items • Sorted by Order Number • Filtered by All orders - Status, Order Record Type • Updated a minute ago

	Ord... ↑ ↓	Account Name	Order S...	Order E...	Status	Service Name	Service Center
1	00000162	Robert Joseph Re...	2023-12-01	2024-07-10	Terminated		Saint John / Saint ...
2	00000180	Tiffany Allison Co...	2024-07-...	2024-07-05	Terminated		Fredericton / Fre...
3	00000199	Smith Tester Patri...	2024-07-01	2024-08-24	Terminated		St. Stephen / Sain...

CONNECTED

[Français](#) [Logout](#)

Disability Support Services

ACTIVE TERMINATED **CONNECTED** CANCELLED

My Connected Services Requests

When a service request is modified, a new cloned service request with the new changes is created. No activated/terminated service request can have an overlap of service period with the respective cloned service request created. Any new service confirmations where the service period is on or after the effective date need to be created for the new cloned service request instead of original service request. And any service confirmations for the time period before the effective date need to be created for the original service request.

27 items • Sorted by Order Number • Filtered by All orders • Order Record Type • Updated 4 minutes ago

	Ord... ↑ ↓	Account Name	Order S...	Service Name	Zone	Service Center	
1	00000138	Tiffany Allison Corb...	2024-06-01		Zone Southwest	Saint John / Saint Jo...	



CANCELLED

[Français](#) [Logout](#)

Disability Support Services

ACTIVE TERMINATED CONNECTED **CANCELLED**

My Cancelled Services Requests

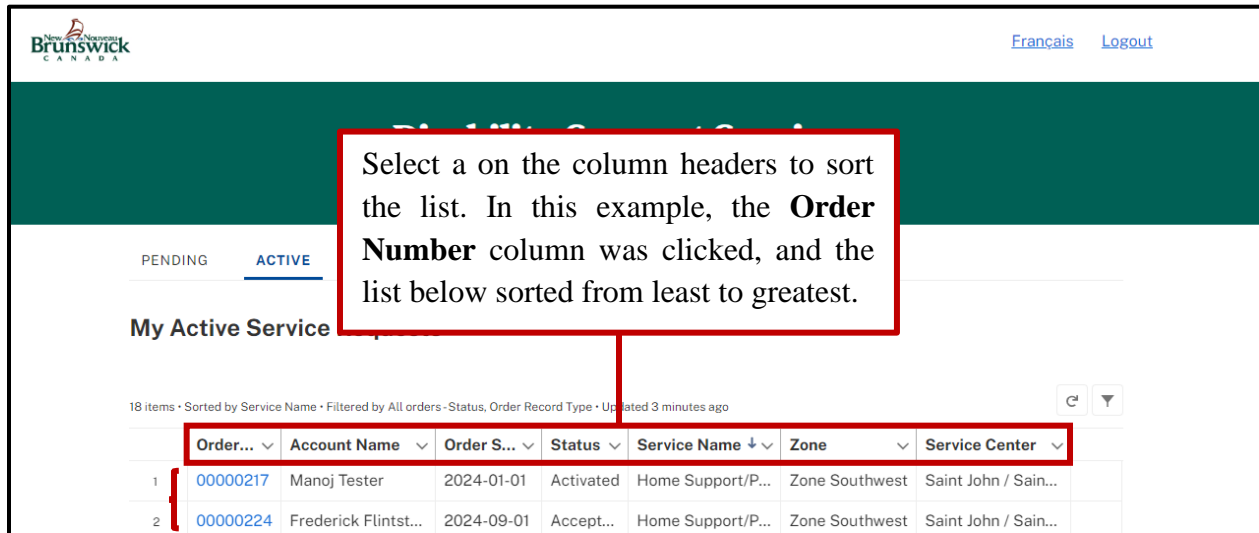
2 items • Sorted by Order Number • Filtered by All orders • Status, Order Record Type • Updated a few seconds ago

	Ord... ↑ ↓	Service Name	Account Name	Status	Zone	Service Center	
1	00000174		Tiffany Allison Corb...	Cancell...	Zone Central	Fredericton / Frederict...	
2	00000219	Home Support/Person...	Manoj Tester	Cancell...	Zone Southwest	Saint John / Saint John	



Sort a List

When on any of the list view tabs, the list views are able to be sorted. This can be done by selecting the headers of each column of the list view. When selected and depending on the column, it will reorganize the list (e.g., A-Z to Z-A, by date, least to greatest, etc.).



Select a on the column headers to sort the list. In this example, the **Order Number** column was clicked, and the list below sorted from least to greatest.

PENDING ACTIVE

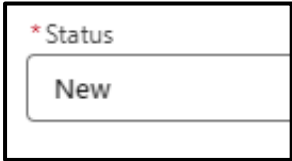


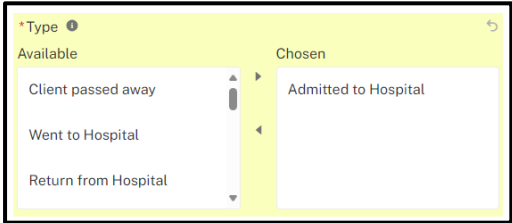

My Active Service



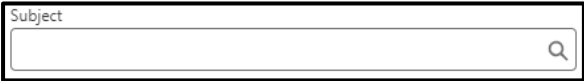
18 items • Sorted by Service Name • Filtered by All orders - Status, Order Record Type • Updated 3 minutes ago

	Order...	Account Name	Order S...	Status	Service Name ↓	Zone	Service Center
1	00000217	Manoj Tester	2024-01-01	Activated	Home Support/P...	Zone Southwest	Saint John / Sain...
2	00000224	Frederick Flintst...	2024-09-01	Accept...	Home Support/P...	Zone Southwest	Saint John / Sain...


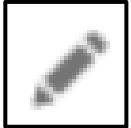



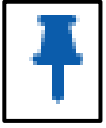
Common CommunityCareNB Components:

General Functionality:

	<p>Mandatory Field: Required fields are indicated with a red or grey Asterix (*)</p>
	<p>Mandatory Information Missing: This icon along with a message is displayed when mandatory information is missing in a required field. Complete the missing information and click save.</p>
	<p>Help Text (information icon): Some fields have an information icon that will display help text when you hover your mouse/cursor over top of it.</p>
	<p>Multi-picklist field: Some fields allow the addition of more than one value. Under the Available column, select each value and click the arrow to add them to the Chosen column.</p>
	<p>Lookup Fields: Some fields allow you to search for a related account, such as a Service Provider or CommunityCareNB User account. These are called “lookup” fields and have a magnifying glass icon.</p>

	<p>Dropdown Menu: A dropdown menu field is indicated by a chevron. When selected, a menu is displayed where you are asked to select the relevant item.</p>
	<p>Text Field: This is a freeform text field, meaning you are able to type in any relevant information without having to choose from a list of provided items.</p>
	<p>Subject: This field, when selected, will display a list of subjects to choose from.</p>

Icons:

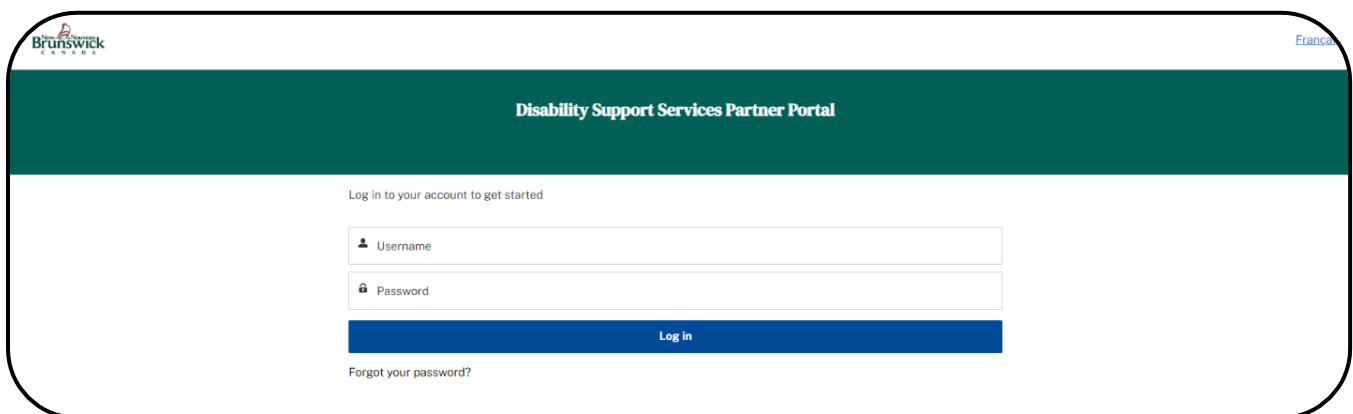
	<p>Action Chevron: This icon allows you to perform various actions such as collapsing a section on a client’s account or to open a dropdown menu of actions that can be performed.</p>
	<p>Pencil: The pencil icon allows you to make modifications to specific fields.</p>
	<p>List View Controls: This icon, when selected, will allow you to add or remove column view types on a list (e.g., note list). This is not accessible to all users.</p>
	<p>Select List Display: Allows you to change how the list is displayed (i.e., List, Kanban or Split View).</p>
	<p>Refresh: When selected, it will refresh the list view to display the most up to date content.</p>
	<p>Pin: This icon allows you to pin a list view (e.g., My Accounts, Recently Viewed, Overdue, etc.). When a List is opened, the pinned list view will always be displayed.</p>

Log In: Partner Portal

Because CommunityCareNB has personal information, we have a responsibility to protect people's private information. In addition to unique username and password, CommunityCareNB uses a second layer of security, multifactor authentication, to ensure the people logging into the system have authorized access.

IMPORTANT: Salesforce will have sent an email asking you to verify your credentials (email) and to set up a password. Do this before completing the following steps.

1. Go to <https://ccnb-scnb.gnb.ca/partnerportal/s/>
2. Copy the above link in your browser's search bar. Click the **Star** icon to favourite/bookmark the link for quick and easy access.
3. Log in using your username and password.

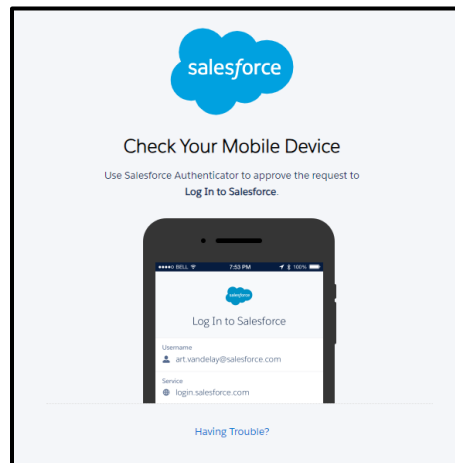


The screenshot shows the login interface for the Disability Support Services Partner Portal. At the top left is the Brunswick logo, and at the top right is a link for 'Français'. The main header is a dark green bar with the text 'Disability Support Services Partner Portal'. Below this, the text 'Log in to your account to get started' is displayed. There are two input fields: 'Username' with a person icon and 'Password' with a lock icon. A blue 'Log in' button is positioned below the password field. At the bottom left, there is a link for 'Forgot your password?'.

Multifactor Authentication (MFA)

In addition to a unique username and password, CommunityCareNB uses a second layer of security, **multifactor authentication**, to ensure that the individuals logging into the system have authorized access.

The Multifactor Authentication message appears asking to open the MFA Salesforce Authenticator App to approve the request. If it doesn't already exist on your device, navigate to the app store (Android or Apple), and download the application.



HOW TO DOWNLOAD & ADD AN ACCOUNT TO MFA APPLICATION

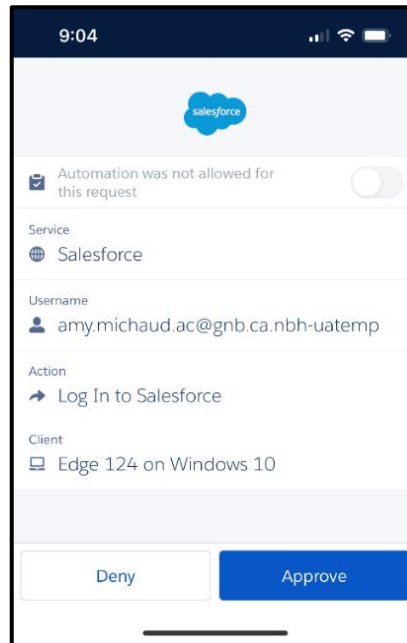
CLICK THE LINK TO WATCH AND LEARN:

[How to Use Salesforce Authenticator for MFA Logins \(For Lightning Experience and Salesforce Classic\) \(youtube.com\)](https://www.youtube.com/watch?v=...)

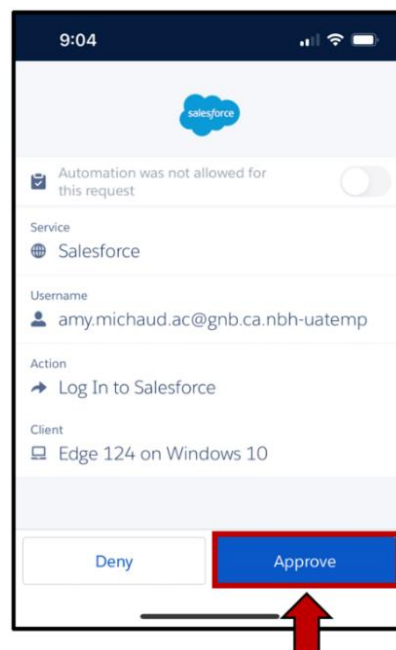


How to Authenticate / Approve on MFA App

1. You will receive a **notification** on your **device** asking you to verify and approve the log in request. The approval request displays the service, username, action (i.e., log in to Salesforce) and where the log in has occurred (i.e., what browser and computer system).



2. On the App, on your mobile device, select **Approve**.



3. Back on your computer, the browser will refresh and display a **green checkmark**, signaling that the authentication worked.



NEW

Logout: Partner Portal

Because CommunityCareNB has personal information, we have a responsibility to protect people's private information. In addition to unique username and password, CommunityCareNB allows the user to manually logout or will automatically logout after 15 minutes of inactivity

1. From any window, click the **Logout** button.



Conclusion

By completing this module, you have covered:

- An overview of how and why CommunityCareNB and the Partner Portal was created
- An introduction to its key features and service provider users in CommunityCareNB.
- Privacy and Security directions for the CommunityCareNB: Partner Portal .
- How to access CommunityCareNB: Partner Portal.
- Multifactor Authentication
- An overview of common system components such as icons and functionality.

These features will assist the DSS Partner Portal users in their daily activities.

CONTINUE to the next applicable topic based on your assigned persona/role:

- [Module A2 – Care](#)
- [Module A3 – Finance](#)