

Introduction to CommunityCare NB Partner Portal

SERVICE PROVIDERS



Community Care **NB**
Soins Communautaires

| USER GUIDE |

Version 0.3

Table of Contents

CONFIDENTIAL STATEMENT	3
Version & Document Control Table	3
MODULE A1 – INTRODUCTION TO COMMUNITYCARENb PARTNER PORTAL	4
What is CommunityCareNB?	4
How SD Staff & Service Providers are Linked	4
What do I need to get started?.....	5
Partner Portal Notable Features	5
Keeping New Brunswickers’ Information Safe	6
Access:	6
Confidentiality:	6
Navigating Partner Portal	7
Homepage Overview	7
Service Request Overview	9
Sort a List	11
Common CommunityCareNB Components:	12
General Functionality:	12
Icons:.....	14
Log In: Partner Portal	15
Conclusion	16

CONFIDENTIAL STATEMENT

The Department of Social Development is the author of this document. The intended purpose and use of this document is to support and train individuals who work in partnership with the Department, and who have been granted access. This document is confidential and solely for the use of the recipient and may not be reproduced or circulated without the Department of Social Development’s written consent. If you are not the intended recipient, you may not disclose or use the information in this document in any way.

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

MODULE A1 – INTRODUCTION TO COMMUNITYCARENB PARTNER PORTAL

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

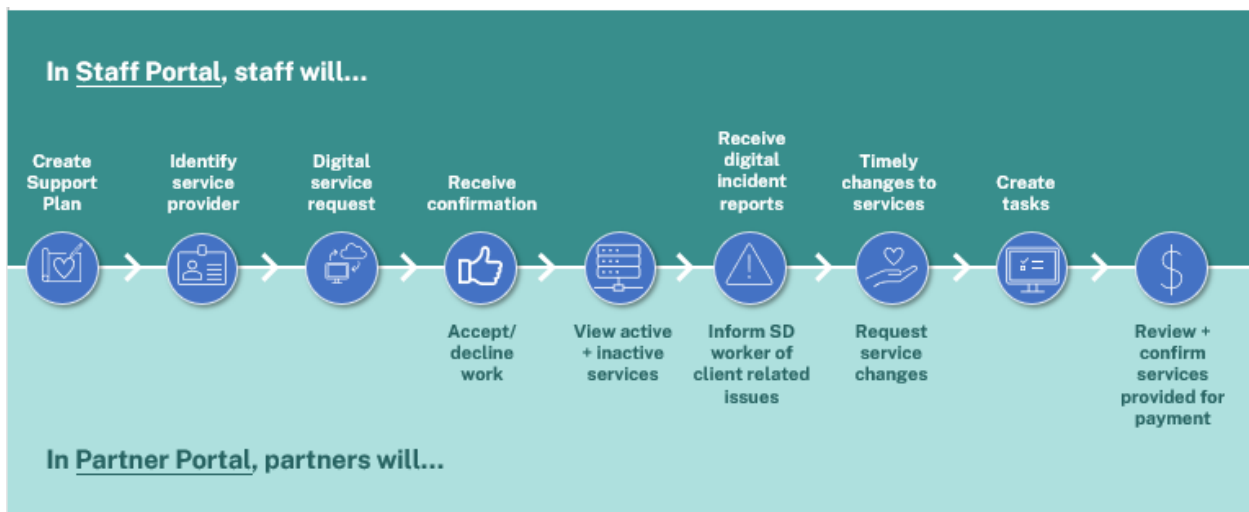
What is CommunityCareNB?

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.

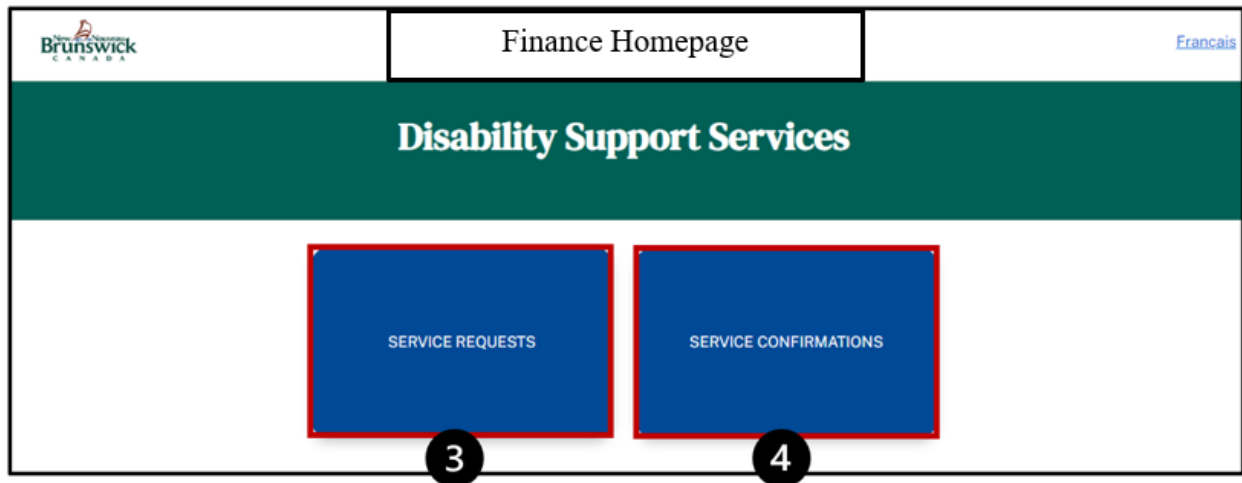
Navigating Partner Portal

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. 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** and **Terminated** 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 tab will open the Service Report history window. From here, you can access all Incident Reports, Observable Changes, and Change Requests for clients receiving services.



3. **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.
4. **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).

Service Request Overview

When the Service Request tab is selected, the following tabs are displayed: **Pending**, **Active**, and **Terminated**. When the **Pending** tab is selected, the **Pending** service request list is displayed. By selecting a potential client, the system displays basic and essential information (e.g., required services, number of hours, etc.). From this record, you are able to accept or reject.

When the **Active** tab is select, a list view is displayed where all accepted and active service requests are displayed (i.e., SD Worker has activated the request on their end, allowing you to log service reports and view additional information). The **Terminated** tab will display a list of all inactive service requests.

Service Request (Care Coordinator)

Pending
Français

Disability Support Services

PENDING
ACTIVE
TERMINATED

My Pending Services Requests

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

	Order Number ↑	Order Start Date	Status	Zone	
1	00000205	2024-07-01	Offered	Zone Southwest	
2	00000224	2024-09-01	Offered	Zone Southwest	

Active
Français

Disability Support Services

PENDING
ACTIVE
TERMINATED

My Active Service Requests

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

	Orde... ↑	Account Name	Order St...	Status	Zone	Service Center
1	00000138	Tiffany Allison Corbett	2024-06-01	Activated	Zone Southwest	Saint John / Saint John
2	00000139	Tiffany Allison Corbett	2024-06-11	Accepted	Zone Southwest	Saint John / Saint John
3	00000141	Susan Barbara Smith	2024-06-15	Activated	Zone Southwest	Saint John / Saint John

Terminated
Français

Disability Support Services

PENDING
ACTIVE
TERMINATED

My Terminated Service Requests

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

	Order ... ↑	Account Name	Order St...	Order En...	Status	Service Center
1	00000162	Robert Joseph Redford	2023-12-01	2024-07-10	Terminated	Saint John / Saint John
2	00000199	Smith Tester Patricia	2024-07-01	2024-08-24	Terminated	St. Stephen / Saint John

Service Request Overview (Finance)

Active
Français

Disability Support Services

ACTIVE
TERMINATED

My Active Service Requests

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

	Order ... ↑	Account Name	Order ...	Status	Zone	Service Center
1	00000445	Isabelle Marie Boulay	3/1/2024	Activated	Zone Central	Fredericton / Fredericton
2	00000465	Michael Alan Patterson	3/1/2024	Activated	Zone Central	Fredericton / Fredericton
3	00000477	Patricia Jane LeBlanc	3/1/2024	Activated	Zone Central	Neguac / Miramichi

Terminated
Français

Disability Support Services

ACTIVE
TERMINATED

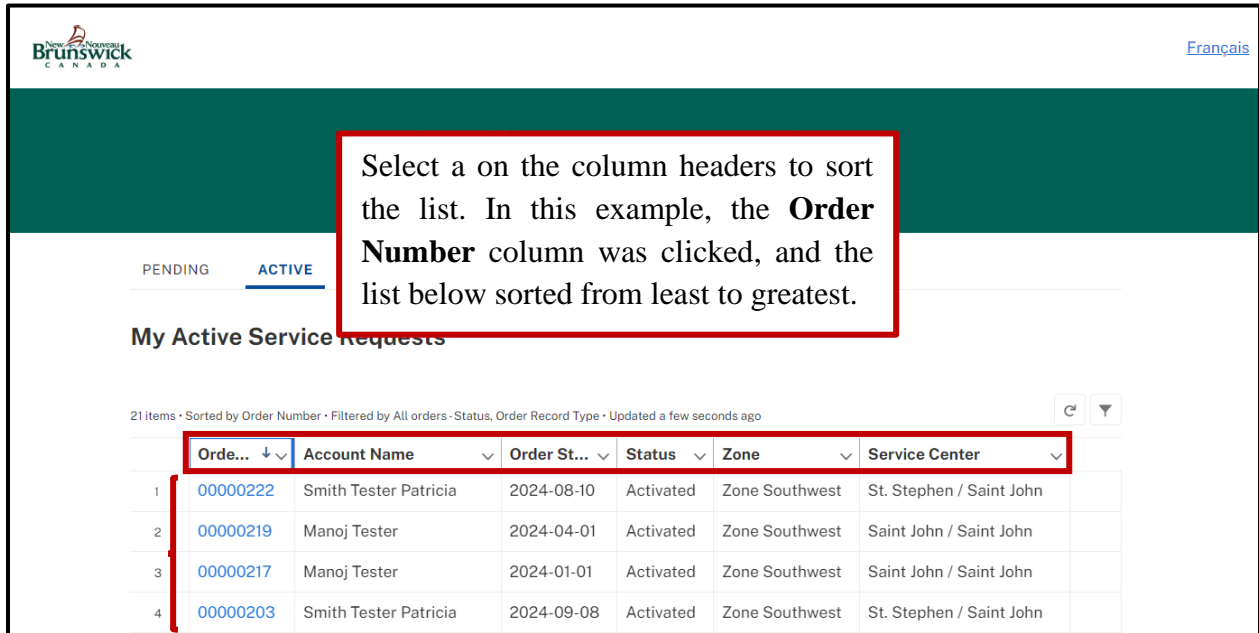
My Terminated Services Requests

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

	Ord...	Account Name	Order ...	Order ...	Status	Zone	Service Center
1	00000379	Peter Parker	3/1/2024	3/1/2024	Terminated	Zone Central	Fredericton / Frederic...
2	00000412	Peter Parker	3/8/2024	3/22/2024	Terminated	Zone Central	Fredericton / Frederic...
3	00000414	Peter Parker	3/1/2024	3/29/2024	Terminated	Zone Central	Fredericton / Frederic...

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.).

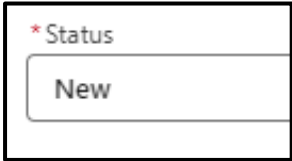


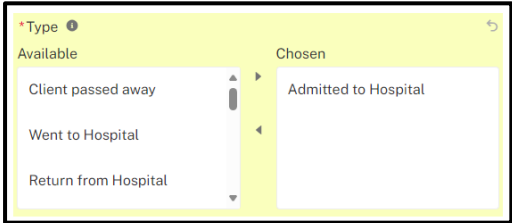





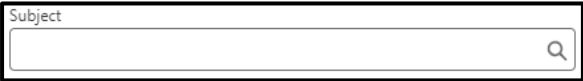
The screenshot shows the 'My Active Service Requests' page. At the top, there are tabs for 'PENDING' and 'ACTIVE', with 'ACTIVE' selected. Below the tabs, the page title is 'My Active Service Requests'. A status bar indicates '21 Items • Sorted by Order Number • Filtered by All orders - Status, Order Record Type • Updated a few seconds ago'. A table with 7 columns is displayed: 'Order Number', 'Account Name', 'Order Start Date', 'Status', 'Zone', and 'Service Center'. The 'Order Number' column header is highlighted with a red box, and a text box explains that clicking this header sorts the list from least to greatest. The table contains 4 rows of data, sorted by Order Number from least to greatest.

	Order...	Account Name	Order St...	Status	Zone	Service Center
1	00000222	Smith Tester Patricia	2024-08-10	Activated	Zone Southwest	St. Stephen / Saint John
2	00000219	Manoj Tester	2024-04-01	Activated	Zone Southwest	Saint John / Saint John
3	00000217	Manoj Tester	2024-01-01	Activated	Zone Southwest	Saint John / Saint John
4	00000203	Smith Tester Patricia	2024-09-08	Activated	Zone Southwest	St. Stephen / Saint John


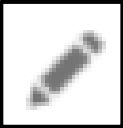

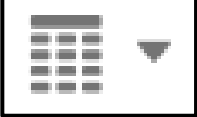


Common CommunityCareNB Components:

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:

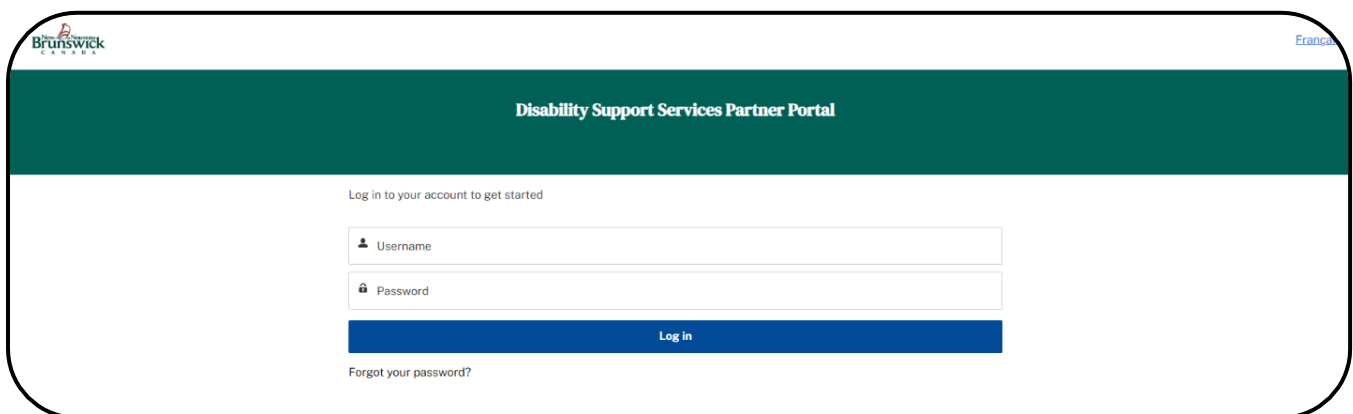
	<p>Action Chevron: This icon allows you to perform various actions such as collapsing a section on a client’s account or to open a dropdown menu of actions that can be performed.</p>
	<p>Pencil: The pencil icon allows you to make modifications to specific fields.</p>
	<p>List View Controls: This icon, 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?'.

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.
- 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](#)