The Contact Management System

December 2024

ALERT-Please Read First:
How to Ensure Receipt of Email Notifications from credentials@mg.khfirst.com

- To receive an email from the above address, you will need to make certain your system will accept the notification.

- If you are in a practice, which has an email server manager-this individual will be able to position your email inbox to accept emails from the above sender. This is called "whitelisting." To whitelist an email address means you add it to your approved senders list. This will keep emails from this sender at the top of your inbox and out of the junk or spam folder. This resource may be onsite or managing from another location.

- If you are in a practice which does not have an email server manager, or uses a third-party provider such as Gmail or Yahoo, follow the steps below:
    - Identify your email provider. This might be an internal or external resource that manages your email server (for example, you use Outlook 365 or an on-premises email server).
    - Work with your email provider to follow the steps to "whitelist" the email address, credentials@mg.khfirst.com.
    - Whitelisting an email address means you are adding an address to an approved senders list and telling your email provider that you want messages these messages in your inbox.
    - Or, you may go to www.youtube.com to read instructions on how to whitelist credentials@mg.khfirst.com.
    - Once this email has been whitelisted, you will be able to receive emails from the sender with no difficulty.

- If you do not whitelist this email, your notifications could end up in the spam folder or blocked.

- **See slide 13 for more information on" whitelisting."**

Introduction

Kids Health First is excited to announce a new portal on our member site. Our goal is to get the right information, to the right person, at the right time.

Currently, we use a broad stroke method to send communications using tools such as the weekly *RoundUp,* the monthly *Billing and Coding Newsletter,* or email messaging. These communications range from industry news, alerts, reminders, general information, or crisis communications.

With this new portal, we will be able to communicate more directly and efficiently with **lead physicians, practice administrators, quality champions, and other individuals in each practice**. This includes staff who need specific information on topics such as billing/coding, quality measures, risk, malpractice, human resources, etc.

The following information will walk you through the process of selecting and registering individuals within your practice who need specific information based on their responsibility and targeted communication topics.

Step 1:

- KHF has collected the names and contact information of each practice's **lead physician, quality champion and practice administrator.**

- If you **have not provided** the information, please send as soon as possible to dscowden@khfirst.com.

  Include name of practice, the above key individuals and their contact information (email address).

- If you do not provide this information, you will not be able to access this new application nor will you or your staff members be able to receive key communications from KHF.

- When this system has launched, the lead physician will have already been subscribed to *RoundUp* and the practice administrator will have already been subscribed to the *Billing and Coding Newsletter* and *RoundUp*.

- The system allows you to add other individuals to these and other communication pieces.

Step 2: Log into www.khfirst.com
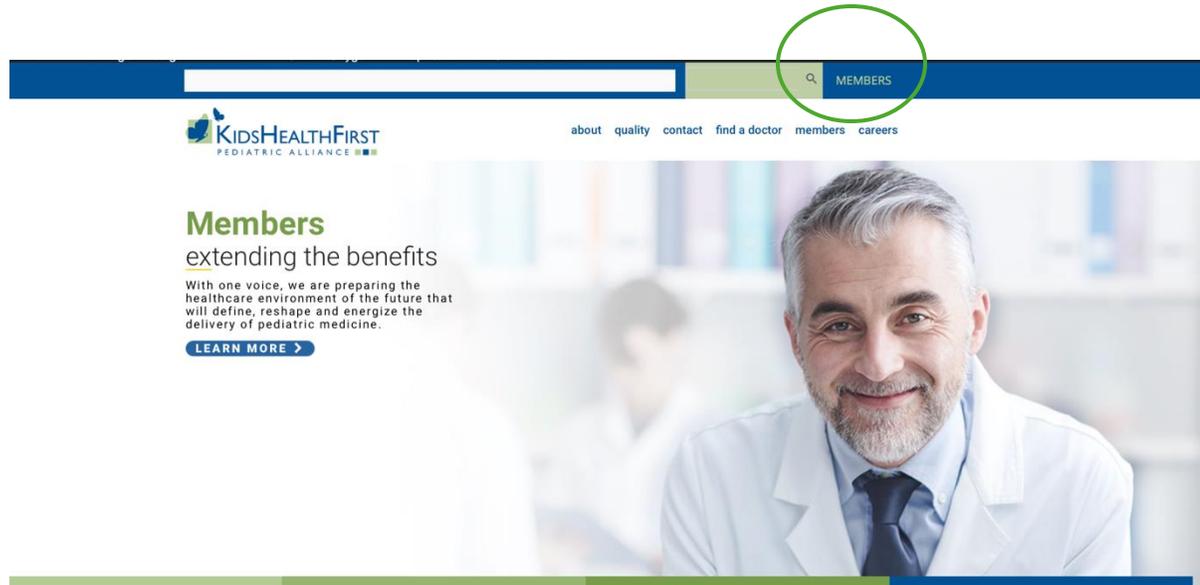
Click on **Members** and you will come to a new screen where you will sign-in with your username and password.
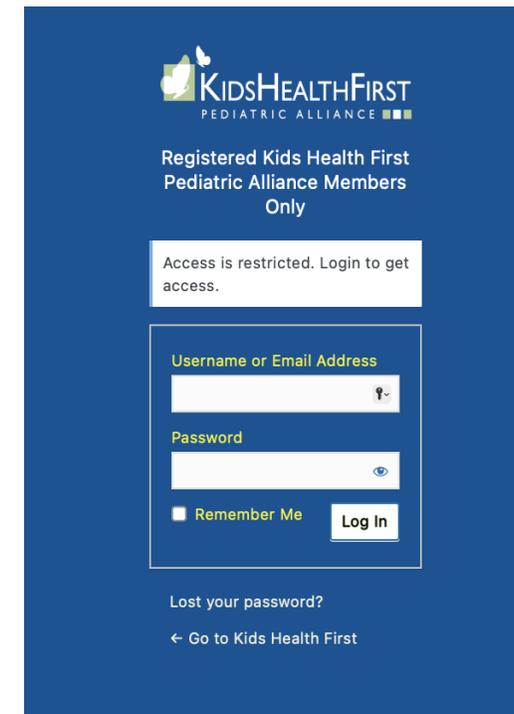
If you do not have a username and password, contact Shatell at information@khfirst.com. She will assist you in setting this up, which gives you access to the intranet (member portal) of www.khfirst.com.

Please keep this username and password handy as you will need it to sign in every time. After you log-in, you may be directed back to your email to verify your identity.

Step 3:

After clicking on members on the previous page, you will be taken to the landing page of the intranet. If you see the blue rectangle which says Update Contacts, click there which will automatically take you to your practice page where you will be able to make changes. Only the Practice Administrator and Lead Physician will be able to make changes. This Update Contacts button will only be visible to those individuals.

The key contacts for each practice (lead physician, quality champion, and practice administrator will be pre-loaded at launch.

Step 4:

You should see the following for your practice:
- Key roles
- Names
- Communication topics

DEF Medium Practice

Add Practice Contact

Key Role	Practice Contact
Lead Physician	Lead Doc LeadDoc Medium-leaddocmedium@khfirst.com
Quality Champion	Donna Medium-dscowden.medium@khfirst.com
Practice Administrator	Donna Medium-dscowden.medium@khfirst.com

Communication Topic	Practice Contact	LP	QC	PA	
RoundUp Newsletter		☐	☐	☐	+
Billing and Coding Newsletter		☐	☐	☐	+
Quality Steps		☐	☐	☐	+
Vaccines		☐	☐	☐	+
Malpractice/Risk Management		☐	☐	☐	+
Human Resources		☐	☐	☐	+

Update

Log-out

Under Key Roles, you will see the **lead physician, quality champion** and the **practice administrator** listed.

Please confirm these names and physicians are correct for your practice.

Once your information has been uploaded into the database, the practice administrator or the lead physician will be able to change this information, as needed.

* The graph above is for demonstration purposes only and does not represent your practice.

7

Step 5:

On the bottom half of this screen, you will see:

a.) Different communication vehicles such as newsletters for **Roundup, Billing and Coding, Quality Steps,** and topics for

b.) **Vaccines, malpractice, risk, human resources, etc.**

* This slide is for training purposes only and items may not be included at this time on your actual screen. New topics to be added in the future.

Communication Topics (cont'd)

This is the section where you will indicate which of the three key roles will receive the different communications.

This is indicated by a check mark on the squares on the right side of the screen.

This is where you will add additional individuals to receive these communications.

ABC Large Practice

Step 6:

To add a practice contact:

    - First click on the blue box at the top left which says " **Add Practice Contact"**

This screen will pop up:

Insert Contact

*First Name:

*Last Name:

Phone Number

*Email Address:

Submit   Cancel

- Insert the information and click on the blue box that says submit.

You will then be able to add or delete contacts. See next slide.

The required fields in the Insert Contact pop-up are first name, last name, and email address

KidsHealthFirst
PEDIATRIC ALLIANCE

DEF Medium Practice

Add Practice Contact

Key Role	Practice Contact
Lead Physician	Lead Doc LeadDoc Medium-leaddocmedium@khfirst.com
Quality Champion	Donna Medium-dscowden.medium@khfirst.com
Practice Administrator	Donna Medium-dscowden.medium@khfirst.com

Communication Topic	Practice Contact	LP	QC	PA	
RoundUp Newsletter		☐	☐	☐	+
Billing and Coding Newsletter		☐	☐	☐	+
Quality Steps		☐	☐	☐	+
Vaccines		☐	☐	☐	+
Malpractice/Risk Management		☐	☐	☐	+
Human Resources		☐	☐	☐	+

Update

Log-out

Clarification on Adding/Deleting a New Contact

To add an individual click on the green box with a + sign.

- This will open an additional space in which you can add a contact. You may add as many additional contacts as you want.

- If you wish to remove an individual, click on the red box with a – sign.

- Always click on **Update** after making any changes.

- Once updated, you will receive an email from credentials@mg@khfirst.com listing all the changes that have been made-**both additions and deletions.**

- Do not reply to this email as it is not monitored.

- Once a name has been added, it is it will stay in the listing even when adding a new contact.

- The listing only goes away when the contact has been deleted.

- One confirmation email notification is sent to the Practice Administrator's email address.

- All actions-additions and deletions-can be completed at the same time resulting in **one summary email listing out all actions completed.** If you complete one action at a time, an email confirmation will be sent individually for each action completed.

*This is a sample for purposes of training.

**Not all staff are eligible to be added to the intranet. Approval from a PA or lead physician will be required.

After Submission of New Contact

The user (practice administrator or lead physician) must click the "OK" button to close the confirmation pop-up.

- After new contact has been entered and submitted, contact is added to Constant Contact and Constant Contact List used to track new contacts added.

- For each new contact, there must be at least one contact list indicating a communication topic.

- The message will be displayed as a confirmation pop-up window to the user if the submitted form is successful.

- You should see a message titled "Practice contact added successfully".

- This action will also update the subscriptions in Constant Contact for the selected users by adding them to the corresponding contact lists.

- Again, the Practice Administrator will receive an email confirmation that the action has completed.

Whitelisting

When you subscribe or unsubscribe an employee in the new system the Practice Administrator will receive a notice that this action has been completed. The sender will be credentials@mg.khfirst.com

For this notice-**by email**-not to end up in spam folder or get blocked, you will need to work with your mail server manager (i.e., Outlook, Gmail, Yahoo, MSN, etc.) to follow the instruction to "whitelist" the email address credentials@mg.khfirst.com. The email address credentials@mg.khfirst.com must be "whitelisted" to ensure this notice is received, and not assigned to a **spam or phishing email.**

Blocked-Not Sent to Spam

There is a possibility the email will not end up in your spam folder, but rather it will be blocked by the email server. Check to make certain this email credentials@mg.khfirst.com has not been blocked.

Again, work with your email server manager to make certain the above email has not been blocked.
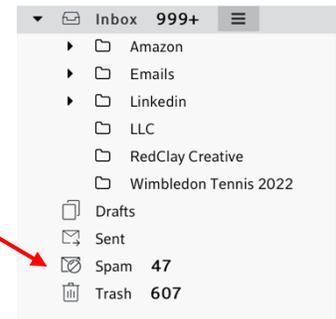
From: credentials=mg.khfirst.com@mg.kidshealthfirst.com <credentials=mg.khfirst.com@mg.kidshealthfirst.com> **On Behalf Of** credentials@mg.khfirst.com
Sent: Wednesday, October 30, 2024 3:21 PM
To: Donna Scowden <dscowden@khfirst.com>
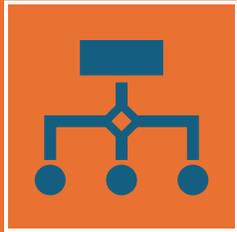**Subject:** Contact Management Update for DEF Medium Practice

The Lead Physician Lead Doc Medium Practice has been subscribed to the commmunication topic Test - Billing and Coding Newsletter using the email address leaddocmedium@khfirst.com.

Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox.

* Definition of "whitelisting"

A "whitelist" is a list of pre-approved entities or resources that are safe or acceptable. In this case, it is the email address credentials@mg.khfirst.com. A whitelist can indicate who has access to a system or is safe to exchange communications. A whitelist of resources may contain websites, software, or applications that have been identified as safe to use. It is the opposite of "blacklisting."

Inbox 999+
- Amazon
- Emails
- Linkedin
- LLC
- RedClay Creative
- Wimbledon Tennis 2022
- Drafts
- Sent
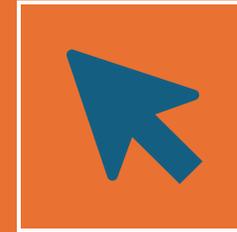- Spam 47
- Trash 607

Summary

EACH PRACTICE WILL ONLY SEE ITS INDIVIDUAL INFORMATION AND **WILL NOT HAVE ACCESS** TO THE OTHER PRACTICES' INFORMATION.

THE PRACTICE ADMINISTRATOR, THE LEAD PHYSICIAN, OR DESIGNEE(ASSIGNED KHF SUPER ADMINISTRATOR) ARE THE ONLY INDIVIDUALS WHO CAN EDIT THIS INFORMATION.

ALWAYS CLICK ON THE **UPDATE OR SUBMIT** BUTTON AFTER MAKING ANY CHANGES.

AN EMPLOYEE MUST REGISTER AS A KHF MEMBER ON THE INTRANET TO HAVE ACCESS TO THIS SYSTEM. IF YOU HAVE A NEW EMPLOYEE OR AN EMPLOYEE LEAVES, PLEASE NOTIFY US AT INFORMATION@KHFIRST.COM.

WE WILL ASSIST YOU WITH ADDING/DELETING MEMBERS TO THE INTRANET

REMINDER: When you subscribe or unsubscribe an employee in the new system the Practice Administrator will receive a notice that this action has been completed.

For this notice not to end up as a **spam or phishing email or to be blocked**, you will need to work with your mail server manager (i.e., Outlook, Gmail, Yahoo, MSN, etc.) to "whitelist" the email address credentials@mg.khfirst.com. Follow the steps below:

1. Identify your email provider. This might be a third-party provider such as Gmail or Yahoo, or you may work with an internal or external resource that manages your email server (for example, you use Outlook 365 or an on-premises email server).

2. Work with your email provider to follow the steps to "whitelist" the email address, credentials@mg.khfirst.com. Whitelisting an email address means you are adding an address to an approved senders list and telling your email provider that you want messages from an email provider in your inbox.

Appendix

Replacing a Practice Administrator

- If you have a PA changing roles or leaving the practice:
  - The current PA's subscription will be transferred to the new person-meaning if the previous PA received RoundUp, the new PA will receive RoundUp without anyone having to go in and make any changes.
  - This action should preferably be completed prior to the PA leaving a practice, provided the new PA has been identified.
  - The new PA will also need to be added to the database in the intranet.
  - The KHF administrator will be responsible for completing that action. Please contact the administrator at information@khfirst.com

Accidents Happen!

- If you accidentally delete a person's name from the new application (Communications Management System), do not worry.

- The information is stored for up to one year in an archived database by our IT partner.

- Contact KHF at information@khf.com and report the deletion.

- We will ensure the information gets returned to the new application immediately.

- It will show up in the drop-down list of contacts to add once again

Q & A

Q: Who has access to this new Contact Management System?

A: Within a practice the PA and Lead physician are the only ones who have access to this system. KHF Administrators will also have access.

Q: How is this different than the intranet(member portal)?
A: Most staff have access to the intranet if they register as a user to the intranet. Some staff will require permission from the PA or lead physician to have access. Once an individual has access, the PA can add him/her to this system to receive specific communications from this system such as RoundUp.

Q: How do I add a new employee to, or delete an employee from, the intranet (member portal)?
A: Please send the employee's name, email address, practice name to information@khfirst.com.

Q: Who do I call with issues or questions?
A: Please contact us at information@khfirst.com.
We will get back to you as soon as possible.

Good Luck!

Please don't hesitate to contact us if you have any questions?