

Provider Self-Service Portal Instructions

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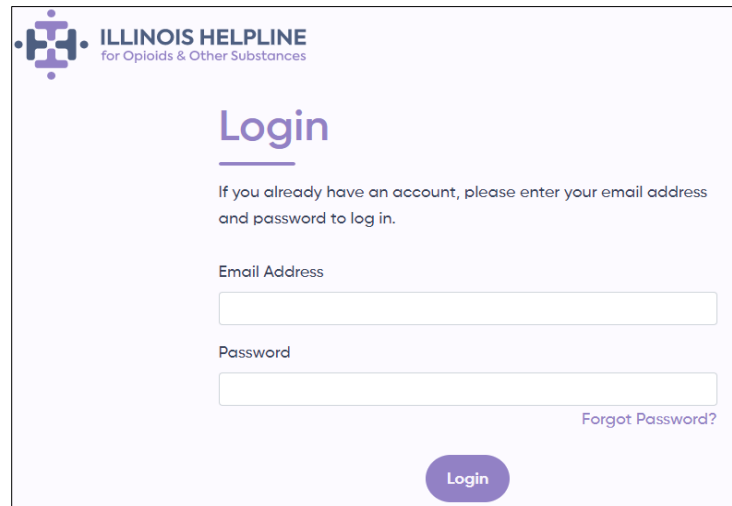
Provider Portal Navigation

- Home
- My Requests
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- My Profile

Getting Started

Get started by visiting <https://helplineil.org/> and clicking *Providers* button (found at the top of the homepage) to sign into your account. You may also want to bookmark the direct Provider Login link: https://helplineil.org/app/utls/login_form/.

If you have created or received a password from the Helpline, you may sign in by entering your email address and password on the Login page.

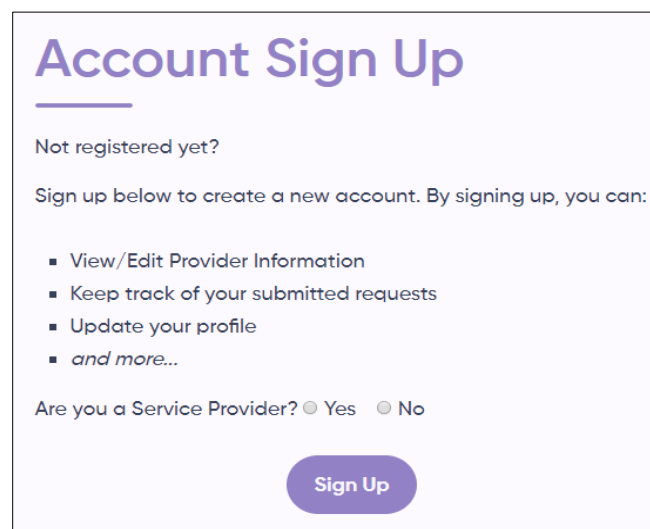


The screenshot shows the 'Login' page for the Illinois Helpline. At the top left is the logo for 'ILLINOIS HELPLINE for Opioids & Other Substances'. The main heading is 'Login'. Below the heading, it says 'If you already have an account, please enter your email address and password to log in.' There are two input fields: 'Email Address' and 'Password'. To the right of the password field is a link that says 'Forgot Password?'. At the bottom center is a purple button labeled 'Login'.

How do I create an account?

If you do not have a login, you can create one by following the instructions under the *Account Sign Up* field, to the right of the Login field.

- Choose **Yes** for the question “Are you a service provider?” then select **Sign Up** to begin the new account registration.



The screenshot shows the 'Account Sign Up' page. The main heading is 'Account Sign Up'. Below the heading, it says 'Not registered yet? Sign up below to create a new account. By signing up, you can:'. There is a bulleted list of benefits: 'View/Edit Provider Information', 'Keep track of your submitted requests', 'Update your profile', and 'and more...'. Below the list is a question: 'Are you a Service Provider?' with radio buttons for 'Yes' and 'No'. At the bottom center is a purple button labeled 'Sign Up'.

- Complete the New Account Sign Up form by answering all required fields and choosing a password. NOTE: Passwords must be at least eight characters long, include at least one letter and one number, and have at least one upper case and one lower case letter. **Passwords CANNOT include any special characters.**
- Once you have completed and submitted your account sign up form, an account verification email will be sent to you at the email you provided. Please click the link in the email to verify your account.

Managing Agency & Program Information

What’s the difference between an Agency and a Program?

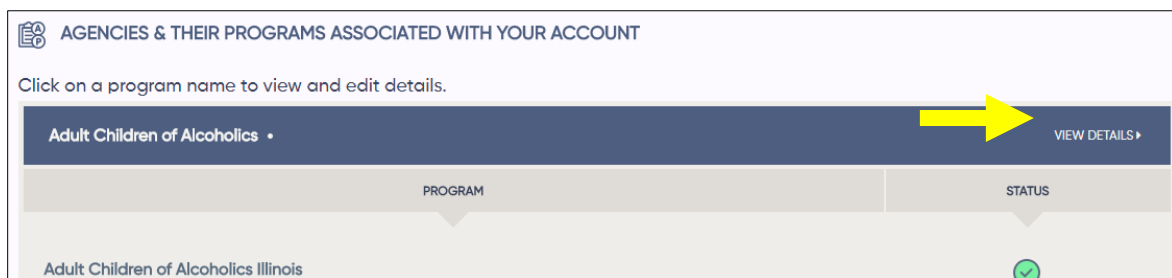
An **Agency** is an organization that provides substance use services. The Helpline structures data so that there is an umbrella **agency** with individual **programs** associated with it. This applies even if an agency has only one program. The Helpline does not make referrals to agencies, so there is limited information contained in agency profiles.

Programs are specific substance use service programs within an agency. Programs may be co-located in the same facility or in different physical locations. Programs may have separate funding sources, provide different services, and/or serve different groups. The Helpline refers people to programs, so accurate program information is essential for making appropriate referrals and for Helpline web visitors to find correct information.

How do I manage my Agency details?

To edit agency details, view your agency’s program profile:

- Next to an agency on your homepage, click *View Details*.



- You will be taken to the agency’s profile page. This is where you can edit agency contact information, including name, mailing address, phone number, and website. You can also view user permissions.

AGENCY INFO	USER PERMISSIONS																				
<p>Name: Adult Children of Alcoholics</p> <p>Mailing Address:</p> <p>Phone Number:</p> <p>Website:</p> <p style="text-align: right;">Edit Details </p>	<table border="1"> <thead> <tr> <th>Name</th> <th>Active</th> <th>Admin</th> <th>Attributes</th> </tr> </thead> <tbody> <tr> <td>NAVEEN CHERUPALLY</td> <td style="text-align: center;">✔</td> <td style="text-align: center;">✔</td> <td style="text-align: center;">✔</td> </tr> <tr> <td>JEN TOTH</td> <td style="text-align: center;">✔</td> <td style="text-align: center;">✔</td> <td style="text-align: center;">✔</td> </tr> <tr> <td>CRISTINA FIGUEROA</td> <td style="text-align: center;">✔</td> <td style="text-align: center;">✔</td> <td style="text-align: center;">✔</td> </tr> <tr> <td>LINA JEW</td> <td style="text-align: center;">✔</td> <td style="text-align: center;">✔</td> <td style="text-align: center;">✔</td> </tr> </tbody> </table>	Name	Active	Admin	Attributes	NAVEEN CHERUPALLY	✔	✔	✔	JEN TOTH	✔	✔	✔	CRISTINA FIGUEROA	✔	✔	✔	LINA JEW	✔	✔	✔
Name	Active	Admin	Attributes																		
NAVEEN CHERUPALLY	✔	✔	✔																		
JEN TOTH	✔	✔	✔																		
CRISTINA FIGUEROA	✔	✔	✔																		
LINA JEW	✔	✔	✔																		

- To update your agency profile, select **Edit Details** (purple button) at the bottom of the Agency Info box. Here you can make changes to an agency name, address, phone number, and description. Note: All items with a red asterisk (*) are required and cannot be left blank. All other items are optional. Be sure to select **Save** when you are done editing.

For ex: (###) ###-#### For ex: (###) ###-####

Description:

[Close](#) [Save](#)

How do I manage my program details and attributes?

To update program information, select a program on your homepage by clicking the name of the program.

AGENCIES & THEIR PROGRAMS ASSOCIATED WITH YOUR ACCOUNT

Click on a program name to view and edit details.

Adult Children of Alcoholics •	VIEW DETAILS ▶
PROGRAM	STATUS
<p>Adult Children of Alcoholics Illinois </p> <p>Chicago IL 60626</p>	<p style="color: green; font-size: 24px;">✔</p> <p>APPROVED</p>

- This will bring you to the program profile page. To make changes to your program profile, select **Edit Details** (purple button) at the bottom of the Program Info box. This will open your program information page where you can make changes to your program name, address, contact information, licensing and funding information, and description. You can also provide other information and details about your program that will be helpful for making referrals, such as intake phone number, intake procedures, funding sources, and other details. All items with a red asterisk (*) are required and cannot be left blank. All other items are optional.

PROGRAM INFO

Name: TEST PROGRAM Apple Program
Updated

Mailing Address: 5700 Granite PKWY, Plano, 75024

Phone Number: (111) 111-1111

SUPR Funded?

Website:

Edit Details
←

[Delete this program](#) | [Clone this program](#) | [Confirm](#)

When you're done, be sure to click **Save** at the bottom of the page to save your changes. Any changes you make to your **program information** are real-time and will be immediately viewable to Helpline staff and web visitors.

What are program attributes?

Attributes describe the key elements of a program, such as treatments or services offered and substances treated, among others. They are a core feature of the Helpline's data system. Attributes help website users and Helpline staff determine who is eligible or best suited for your program.

In the Attributes box in your program profile, you can make edits to a program's: substances treated, special populations served, treatments and services offered*, payments accepted, additional services offered, ages served, genders served, and language specialties.

Below, we first describe each set of attributes, then we describe how to edit or update these attributes.

ATTRIBUTES	
Substances Treated (77)	+ Add New
Special Population (0)	+ Add New
Treatments and Services Offered (1)	+ Add New
Payments Accepted (0)	+ Add New
Additional Services (0)	+ Add New
Ages Served (1)	+ Add New
Genders Served (2)	+ Add New
Language Specialties (2)	+ Add New

- **Substances Treated:** This includes any substances that an individual may be using and still meet eligibility criteria for your program. Make sure any substances that exclude individuals from eligibility for your program are not selected.
 - Helpline staff and our online assessment help individuals determine the appropriate services or level of care, so this should not be the main concern when selecting substances treated.

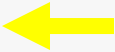
For example, a methadone clinic may select all opioids/opiates under *Substances Treated* but should also select any other substances that clients may be using before they start the clinic, such as marijuana or cocaine. They would not select or would delete any substances that would make a client ineligible for their clinic. For instance, if someone using diazepam would not be accepted at the clinic, they should make sure that substance is not selected.

- **Special Populations:** These are special populations or attributes of clients that a program serves. This may include special populations such as people who have a dual diagnosis (substance use and mental health) as well as eligibility requirements, like sobriety. You can click **Add New** and scroll through the available options and select all populations/client types that your program would accept or accommodate. You should also select any populations for which your program has a specialty and/or receives funding to serve. If applicable, you can link selected populations with treatments/services to indicate specialties and funding status in *Treatments and Services Offered*.
- **Treatments and Services Offered:** This field is where you should identify the primary treatments and services offered by your program. For many programs, Treatments and Services Offered should include all services for which that program is DHS/SUPR licensed and/or funded. For programs that do not require DHS/SUPR licensure for substance use treatment, this should include the main services offered, such as Insurance Helpline & Hotline Information or Self Help & 12-Step Groups. When editing treatments and services offered, you can also indicate any special populations that the program specializes in serving and/or receives funding to serve.
- **Payments Accepted:** This field should include all forms of payment that are accepted by your program, including private and public health care plans, self-pay, sliding scale, etc.
- **Additional Services:** Additional services are secondary services offered by a program or special characteristics of a program. This information helps web visitors and Helpline staff identify appropriate referrals but is generally not used as primary search criteria. You can click **Add New** to scroll through the available options and select services that apply to your program. Please be sure to delete services that are not offered.
- **Ages Served:** This indicates the age group(s) the program serves.
- **Genders Served:** This indicates the gender(s) the program serves.
- **Language Specialties:** This indicates the languages in which your program offers services, without using interpreters.

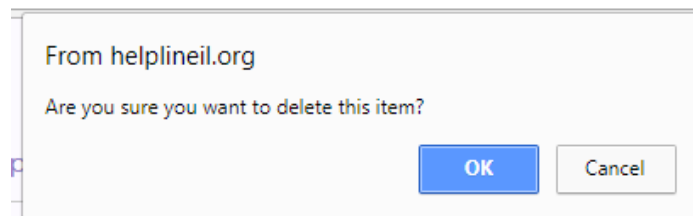
How do I edit program attributes?

Each attribute is edited in a similar way. Any changes you make to your **program attributes** are real-time and will be immediately viewable by Helpline staff and web visitors **EXCEPT for changes to *Treatments and Services Offered***. See below for important information about making changes to *Treatments and Services Offered* and *Payments Accepted*.

First, click on the attribute category (i.e., Substances Treated) to view or delete attributes already associated with your program. All attributes already associated with your program will show up as **Active** (green) in the **Status** column.

ATTRIBUTES		
Substances Treated (4) 		+ Add New
Name	Status	Action
Heroin	Active	Delete
Fentanyl	Active	Delete
Alcohol	Active	Delete
Cocaine	Active	Delete
Special Population (2)		+ Add New
Treatments and Services Offered (3)		+ Add New
Payments Accepted (3)		+ Add New
Additional Services (2)		+ Add New

- To delete an attribute, click the purple **Delete** button in the **Action** column. The system will display a pop-up message to confirm the deletion.



- To add a new attribute, click **+Add New** (in the upper right corner) next to each attribute type.

ATTRIBUTES

Substances Treated (4) + Add New

Name	Status	Action
Heroin	Active	Delete
Fentanyl	Active	Delete
Alcohol	Active	Delete
Cocaine	Active	Delete

Special Population (2)
+ Add New

Treatments and Services Offered (3)
+ Add New

Payments Accepted (3)
+ Add New

Additional Services (2)
+ Add New

- In the “Choose or Type a Name” box, you can click inside the box to view a drop-down list of options or begin typing an attribute name.

Fields marked with * are mandatory

Use this section to add new items to **Substances Treated**

Choose or type a name: * (Select All)

Note to Helpline Administrator:

Cancel
Submit

- NOTE: Attributes already associated with your program will not appear in the **Add New** options list.
- NOTE: You can save time and add multiple attributes at one time by selecting multiple options from the drop down or by clicking **Select All**. (Select All is not available for Treatments and Services Offered.) You can remove items from this box by clicking the X next to the attribute name.
- Save your changes by selecting **Submit**.

*Fields marked with * are mandatory*

Use this section to add new items to **Substances Treated**

Choose or type a name: * [Select All](#) | [Deselect All](#)

Barbiturates × Crack × MDMA (Ecstasy, Molly) × Adderall × Aerosols ×

Note to Helpline Administrator:

Cancel
Submit

How do I edit Treatments and Services Offered?

It is important to identify the main services offered by a program, as opposed to selecting all of the services offered. Main services are generally offered to clients as a core service, or independent from other services. For example, a Residential Extended Care program that offers counseling and HIV education for residents should only select Residential Extended Care, since counseling and HIV education are offered to clients as part of the Residential Extended Care program.

- Making changes to the *Treatment and Services Offered* attribute is the same as other attributes, EXCEPT any changes you make to **Services and Treatments Offered must be reviewed and approved by Helpline staff**. This is to confirm licensure and/or program eligibility. You will receive an email when you submit the change and when the request has been processed. For this reason, **these changes do not occur in real-time and will not be available to website visitors or Helpline staff until they have been approved.**

- Some programs specialize in or receive funding to provide certain services to a specific population. When adding a new treatment/service, you will be asked to indicate whether your program specializes in or receives funding to provide the service to a special population. If you select Yes for either question, select the population from the drop-down list labeled “Select Special Population.” Both questions refer to the same population. For treatments/services already associated with your program, click on the treatment/service type name to edit this information.

Do you specialize in offering **Self Help & 12-Step Groups** to specific populations? *

Yes No

Do you receive funding to offer **Self Help & 12-Step Groups** to specific populations? *

Yes No

Select Special Population: *

Homeless
▼

Cancel

Previous

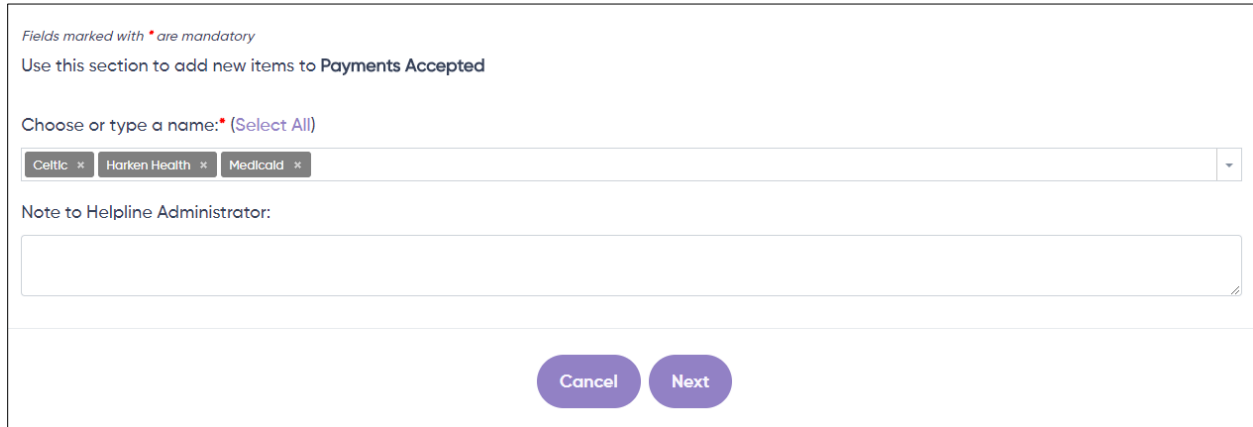
Submit

- Note: At this time, you can only link one Special Population to a treatment. If you specialize in and/or receive funding to offer the same service to more than one special population, you will have to indicate this in a separate program record. (See *How do I Copy a Program* below.) If you specialize in or receive funding to offer multiple services to the same population, you can indicate this for each treatment/service individually within the same program profile. You may also select multiple options under the Special Populations attribute (see above) to identify any groups that your program serves, but are not necessarily considered a specialty of your program.

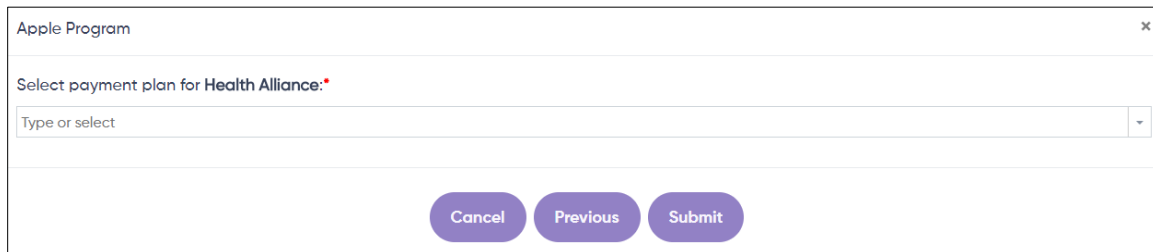
How do I edit Payments Accepted?

Editing the *Payments Accepted* attribute differs slightly from other attributes. There are many different health plans available in Illinois. To make this process easier for providers and consumers, there is a two-step process for adding *Payments Accepted* to your program profile Any changes you make to the ***Payments Accepted*** attributes are real-time, and will be immediately viewable by Helpline staff and web visitors.

Step 1: Click **Add New** then click inside the box labeled “Choose or Type a Name” to see the list of the broader categories of payment options, including health insurance companies or healthcare plan types. Select the options that that your program accepts and click **Next**.



Step 2: Based on the Payment Option(s) you selected, the system will automatically select all available payment plans for that option(s). If you don't know the specific plans accepted by your program, we suggest leaving all the health plans from that company/category in the box. If you know the specific plans your program accepts, remove those that don't apply by clicking the small “X” next to each plan name in the selection box. Click **Submit** when you are finished.

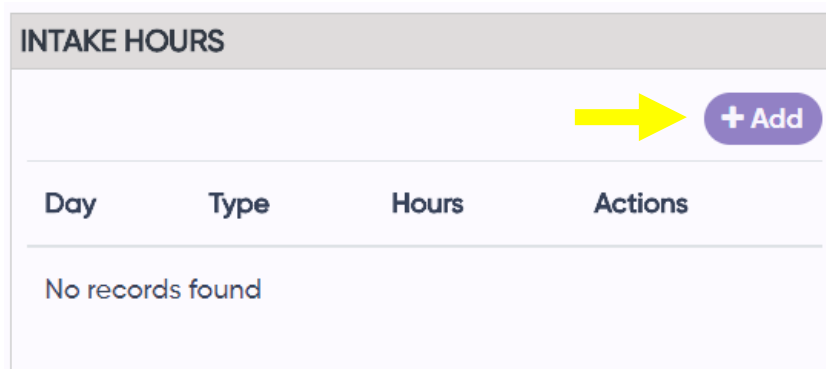


- Health care plans change frequently. If there are plans accepted by your program that are not listed in the system, submit a note to the Helpline team using **Make a Request > Other** (instructions below).

How do I update phone or walk-in intake hours?

The Intake Hours box allows you to identify days and times during the week when you conduct intakes by phone and/or walk-in. Some programs may conduct intakes anytime that they are open, while others may only do intakes during certain hours. In addition, some programs may allow walk-ins, while others may not. Providing this information allows Helpline Specialists to connect callers to your program directly (if the call is during your phone intake hours), or to share intake or walk-in information to facilitate access.

To add phone and/or walk-in days and times, begin by selecting **+Add** in the Intake Hours box.



This brings up the *Add a new schedule* box, where you can add information about the days and hours you offer phone and/or walk-in intakes.

Add a new schedule ✕

Fields marked with * are required and cannot be left blank

Select Day: *

Select Type: *





From: *

To: *

- Next to **Select Day**, click on the down arrow to see the available options. You can choose every day, every weekday, or the specific day(s) of the week.
- Next to **Type**, click on the down arrow to choose either **Phone** or **Walk-in**.
- Next to **From**, click on the down arrow to choose the time of day that the intake hours begin. NOTE: The options in the drop-down list are shown in standard time (AM and PM), but once selected, they will display in military time (24-hour clock) in the Intake Hours box.
- Next to **To**, click on the down arrow to choose the time of day that intake hours end.
- Click **Save** to save your entry NOTE: The options in the drop-down list are shown in standard time (AM and PM), but once selected, they will display in military time (24-hour clock) in the Intake Hours box.
- Repeat the above steps as necessary to provide all phone and walk-in intake hours.

You can change your entries at any time by returning to the Intake Hours box.

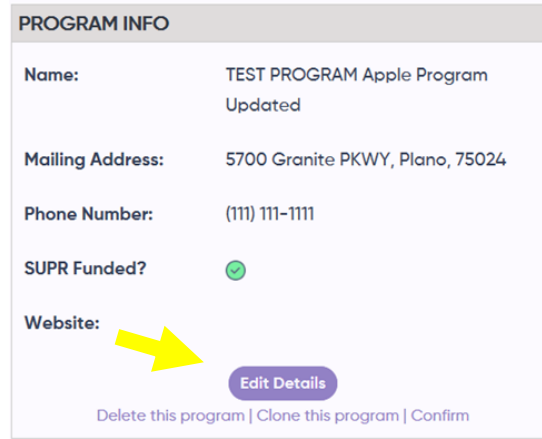
- To edit an entry, select the pencil icon in the **Actions** column make the change, and click on **Update** (purple button) at the bottom.
- To delete an entry, select the small “X” in the **Actions** column, then click “Okay” in response to the pop-up message confirming your intent to delete the entry.

INTAKE HOURS			
Day	Type	Hours	Actions
Weekdays	Phone	12:00 - 18:00	 
Weekdays	Walk-in	11:00 - 13:00	 

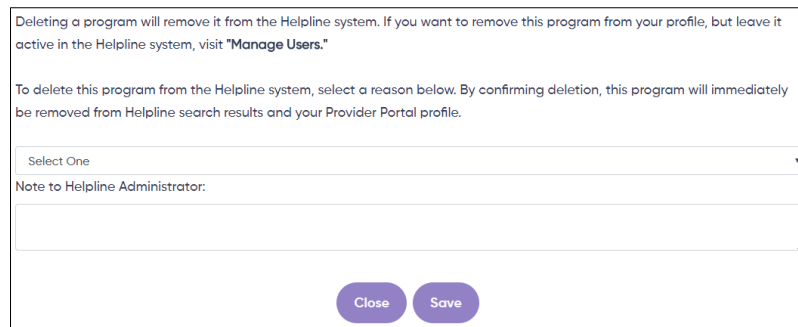


How do I delete a program?

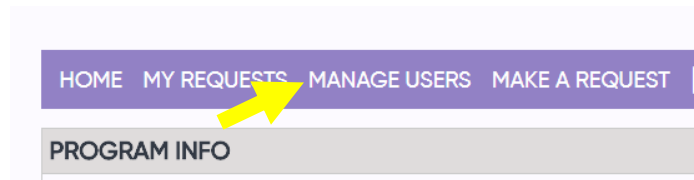
If you notice a program in your account that is closed or is a duplicate, you can delete it from the Helpline system. Navigate to the Program page by clicking the name of the program on your Home page and then click **Delete this program** at the bottom of the Program Info box.



When you click **Delete this program**, you will receive a pop-up asking you to provide the reason for the deletion and asking you to confirm it. When you click **Save**, the program will no longer appear in Helpline searches or in your Provider Portal Account.



If you are only trying to remove a program or agency from your account, but keep it active in the Helpline system, visit the **Manage Users** tab and remove yourself from the program.



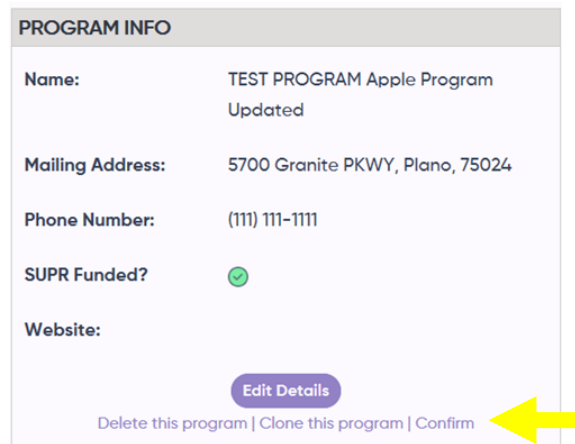
Can I copy a program?

If your agency operates multiple similar programs, you can save time by “cloning” your program rather than adding them individually to the Helpline system. You might also want to clone a program if you have a program that specializes in and/or receives funding for providing a service/treatment to several special populations.

To clone a program, you must start with a program that is already in the system and associated with your account. Cloning a program creates a new program with the same attributes as an existing program. You can then update this new “clone” to include accurate program details, like contact information and description. Programs you created by cloning will automatically be associated with your Provider Portal account.

How do I copy a program?

Navigate to the program page by clicking on the program name on your Provider Portal home page. At the bottom of the Program Info box, click on ***Clone this program***.



When you click on ***Clone this program***, you will receive a pop-up message reminding you to update the details of the new program. The fields will be automatically filled with information from the existing program. Be sure to update each field for the new program. When you are finished, click ***Save***.

Clone Program x

Cloning a program sends a request to the Helpline to create a new program with the same attributes as the original program. Attributes include features of the program, like services offered and clients served. You may enter contact details below for the new program. You will be notified when your request for the new program has been processed.

Fields marked with an (*) are mandatory and cannot be left blank/empty

Provider Details

Provider Name:*	License No#:	Website:
<input type="text" value="Apple Program"/>	<input type="text" value="1234"/>	<input type="text"/>

Address Details

<u>Mailing Address</u>	<u>Physical Address</u>
<small>Note: For public use</small>	<input type="checkbox"/> Same as Mailing Address
Address Line 1:*	Address Line 1:
<input type="text" value="5700 Granite PKWY"/>	<input type="text"/>
Address Line 2:	Address Line 2:
<input type="text"/>	<input type="text"/>

IMPORTANT NOTE: Because cloning a program will add a new program to the system, it requires approval from a Helpline staff member before it will appear in Helpline search results for web visitors or Helpline staff. You are not able to edit the attributes of a cloned program until it has been approved by a Helpline team member. You will receive a confirmation email when your request to clone the program has been submitted and when it has been approved.

Provider Portal Navigation

Below is a description of the options available on each page of the Provider Portal (found at the top of the page in the purple header).



Home: After logging in, you will see the Provider Portal homepage. Here, you can access and manage your account, and view the agencies and programs associated with your account. Depending on your account settings, you may have agency and/or program profiles associated with your account. The image below of a sample homepage shows two agencies (Adult Children of Alcoholics and Apricot Agency), each with one program associated with it (Adult Children of Alcoholics and Apple Program).

HOME MY REQUESTS MANAGE USERS MAKE A REQUEST | JEN TOTH (LOGOUT)

AGENCIES & THEIR PROGRAMS ASSOCIATED WITH YOUR ACCOUNT

Click on a program name to view and edit details.

Adult Children of Alcoholics •		VIEW DETAILS ▶
PROGRAM	STATUS	
Adult Children of Alcoholics Illinois Chicago IL 60626	 APPROVED	

Apricot Agency •		VIEW DETAILS ▶
PROGRAM	STATUS	
Apple Program 5700 Granite PKWY Plano TX 75024	 APPROVED	

My Requests: My Requests allows you to see all the requests you have submitted, and any searches you have saved.

Submitted Requests

My Requests

List of service requests you have submitted recently.

Submitted Requests | Saved Searches

S.NO	REFERENCE NUMBER	SERVICE TYPE	STATUS	LAST UPDATE
1	180326-000022	Add/Change Attributes	Solved	04/19/2018 08:06 pm
2	180413-000009	Add/Change Attributes	Unresolved	04/19/2018 08:02 pm



Saved Searches

Submitted Requests
Saved Searches

Click on a panel to see more details.

Reference Number: 180321-000007 | City: Mount Vernon | Radius: 100 miles

[View Results](#)

SELECTION CRITERIA	VALUES
Treatment	Vivitrol / Injectable Naltrexone

Reference Number: 180326-000017 | City: Chicago | Radius: All of Illinois

Manage Users: Administrators* can manage user permissions for any program or agency for which they are an administrator. This includes the ability to add another user and/or remove existing users. If a user *does not* have administrator permissions, they can **only** see a current list of users.

***Note:** Users can be designated as Administrators in several ways. For SUPR-licensed programs, licensing contacts may automatically be set up with administrator rights for their programs. There is no limit to the number of Administrators a program or agency can have; existing Administrators can grant administrator rights to additional users as well. If you create or register a program within the Helpline system, you will automatically be made an Administrator for that program once it is approved. Unless otherwise requested, the first user associated with a program/agency will be granted administrator rights as well (see **Make a Request** below for instructions).

Manage Users

Add a User

Apricot Agency

FULL NAME	ADMINISTRATOR RIGHTS	MANAGES ATTRIBUTES	ACTION
JEN TOTH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
LINA JEW	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove

Apple Program

FULL NAME	ADMINISTRATOR RIGHTS	MANAGES ATTRIBUTES	ACTION
JEN TOTH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
LINA JEW	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove

To edit the permissions of a user, select or deselect the box in the column for administrator rights or manages attributes for each user.

- **“Administrator Rights”** allows a user to add, delete, or edit permissions for other users.
- **“Manages Attributes”** allows a user to manage program information and attributes, but they cannot add, delete, or grant rights to other users.

To add or delete users:

- To delete a user, click **Remove** in the far-right column next to that individual’s name. You will receive a pop-up notification asking you to confirm the deletion.
- To add a user, click **Add a User** (purple button) at the top right corner of the Manage Users box. Newly added users will receive a confirmation email after they have been successfully added. You can add a user with or without an existing Provider Portal account.

Make a Request: This tab allows you to communicate with the Helpline Administrator to add a new agency or program, or to get help with an existing program or a problem you’re having with the Provider Portal. When you click on the Make a Request tab, you will see five options (each described below).

Make a Request

Select Request Type: *

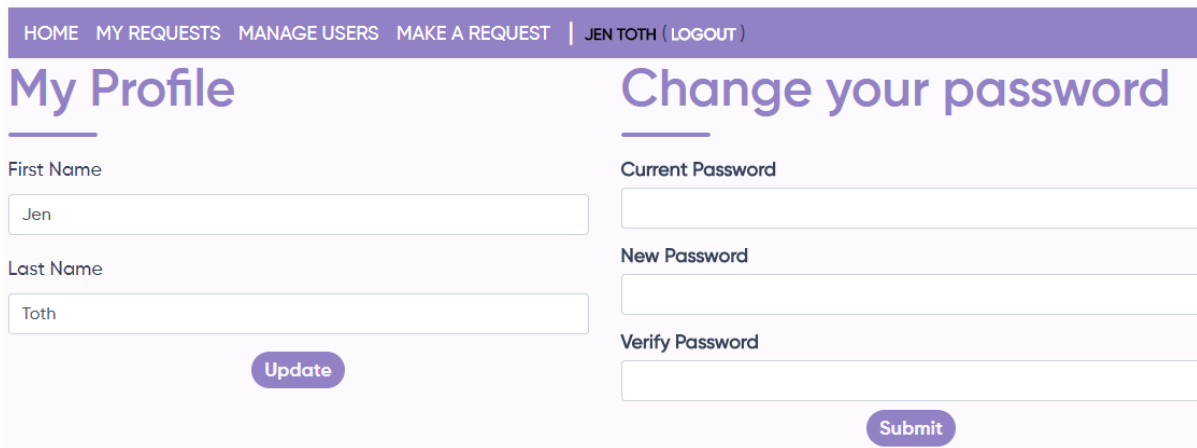
- New Agency - *I am with a new agency and program, not affiliated with any existing agency/organization*
- New Program - *I am with a new program and the Helpline already has my agency/organization information*
- Existing Program - *I am with an existing program and the Helpline already has my program listed*
- Portal Problem - *I am having problems updating my agency or program information*
- Other

- **New Agency:** Select this option if you want to add a new agency that is not already in the Helpline system. Complete the Provider Details page. Note that all information with a red asterisk (*) is required and cannot be left blank. Click **Submit. This request must be reviewed and approved by a Helpline staff member before a new agency is added to the system.**
- **New Program:** Select this option if you want to add a new program to the system. If the Helpline does not have your agency information already listed, you will need to submit a new agency request as well. **This request must be reviewed and approved by a Helpline staff member before a new program is added to the system.**

- **Existing Program:** Submit a request to a Helpline staff member to associate your account with a program already listed in the Helpline system. Provide the requested program details so that your account may be associated with an existing program. Click **Submit**. Your request will be reviewed, and a Helpline staff member may contact you if additional information is required. You will receive an email when your request is approved. If there are no other contacts associated with the program, you will be granted administrator rights for the program. If there is a staff member at your program with administrator rights to the program’s Helpline profile, they can add you to the program immediately.
- **Portal Problem:** Select this option if you want to report a problem or error. You can use the description box and/or add attachments (e.g., a screenshot) to provide more detail about the issue.
- **Other:** Select this option to contact a Helpline staff member with any other questions, requests, or problems.

For all of the above options, you will receive an email when your request is submitted. You can view the status of a request in the **My Requests** tab.

My Profile: Click your name to update your Provider Portal Profile. Here, you can edit your name and change your password.



To change your name, make the update or correction in the first and last name fields and press **Update** to submit.

To change your password, enter your current password in the first field and enter a new password in the next two fields. Press **Submit** to save. Note: Your password must be at least eight characters long, include at least one letter and one number, and have at least one upper case and one lower case letter. **Passwords CANNOT include any special characters.**

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