

Find Local Help Upkeep Tool Technical Demonstration Transcript



This document is a transcript of the recorded technical training demonstration on how to complete the Find Local Help Upkeep Tool.

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Introduction

Welcome to the demonstration of the Find Local Help Upkeep Tool. As a certified application counselor designated organization, or CDO, or a Navigator Grantee, you are responsible for maintaining your Assister locations on the Find Local Help Consumer Tool. This demonstration will show how to list or unlist your organization, add, edit, and delete your Assister locations on the Find Local Help Consumer Tool, add/edit your organization acronym if you have one, view your submitted requests and submit your Find Local Help request. All Find Local Help location changes are done using the Find Local Help Upkeep Tool.

Accessing the Find Local Help Upkeep Tool

To access the Upkeep Tool, you will go to the link provided to you in a Listserv message once this tool goes live on April 20, 2022. Going forward, CDOs and Navigators are provided with the link to the Upkeep Tool as part of your Welcome package, once you are approved as a CDO, or Navigator Grantee.

Logging In on the Welcome Page

When you access the Upkeep Tool, you will arrive on the Welcome page. At the top of the page of the actual Upkeep Tool, the following resources will be available for your reference to complete the Upkeep Tool. There will be a user guide, a job aid, and FAQs.

Agents and brokers should not use this form. If you are an agent or broker and need to update your listing, please contact the agent and brokers help desk for instructions about how to update your information. That email address is shown at the bottom left of the screen and when you hover on the contact the agent and brokers help desk link on the actual Upkeep Tool, you will be able to open to an email and get this address as well.

Only the leadership contacts on file with CMS for your organization can access the Upkeep Tool and modify FLH listings on the Consumer Tool. For example, for CDO's, your leadership contacts would be your C-A-C Project Director, Organization Senior Official, or Secondary Contact if you have one. Be sure you have your first name, last name, email address, and Assister ID ready and exactly how it is listed for you as a leadership contact for your organization.

Also, when completing the Upkeep Tool, you must complete your request in one session, or your information will be lost if not submitted.

We are going to complete the information to login. Your First Name, Last Name, Email address, and your Assister ID. If you hover on the information bubble, it will tell you for CDO users, enter your 8-digit CDO ID. For Navigator users, enter your 8-digit Nav ID. Don't know your ID, you can contact findlocalhelp_FFMassister@cms.hhs.gov for help. If any of the information entered does not match exactly what is on file for you as one of your organization's designated leadership contacts, you will receive a Contact Not Found alert message when you select Submit. I'm going to demonstrate this message for you now.

Contact Not Found Message

Enter your information, select the ReCAPTCHA "I am not a robot" and select Submit. You can see that I did receive the message saying "Contact Not Found", so some of my information is not correct for what is on file for a leadership contact. What you will then need to do to re-enter your information is refresh your browser and this will then bring you back to the Welcome page, re-set for you to enter your information again. Make sure your information is correct. Select the "I am not a robot" and Submit. Once you have entered all your information correctly and you are one of the leadership contacts, you will come to the FLH Listing(s) page.

FLH Listing(s) Page

Use the tools on this page to control which locations within your organization can be found on the FLH tool, the Consumer Tool, on healthcare.gov. If you hover on the FLH Tool link, down in the bottom left corner it will show you that address for the Consumer Tool.

From this page, you can add or edit your organization acronym, if you have one, list or unlist your organization, add, edit, delete, list or unlist any of your Assister locations for your organization, and view your submission confirmation for the current session.

To modify your service location such as your counties and states or if you need to modify any organization contacts, CDOs must have your leadership contacts use the Organizational Maintenance Web Form and Navigators must go to your Project Officer.

The Current FLH Status indicates the status of your organization on the Consumer Tool.

Listed status means a user can find your organization by using the Search feature on the Find Local Help Consumer Tool. With your organization in a Listed status you can add, edit, delete, list or unlist your Assister locations for your organization.

Unlisted status means your organization and any associated Assister locations are removed on the Find Local Help Consumer Tool. So, if you wanted to unlist your organization from the Consumer Tool, you would select Unlist Organization, confirm Yes or No whether you would like to unlist your organization from the Find Local Help Tool. If you do unlist your organization, you can list it again in the future using this Upkeep Tool. For the purposes of this demo, we will continue with the organization is a Listed status, so I'm going to reply No.

My Find Local Help (FLH) Listing(s) Page

On the FLH Listing(s) page, you will find your My Find Local Help, FLH, Locations table. This shows you all of the locations that are either listed, that you have added that are for your organization. It shows the Name, Address, their Phone number, any Email address, what Status this location is in, and the Action column for what you would like to do with any of these locations. You can see that we have one that is Unlisted and then we have those that are Listed locations. I'm just going to expand the table to show all of your listings, as you can do right down here.

Add a Location

To add a location, your organization must be in a Listed status in this blue box. That's your organization listing. And you must have no pending change requests in the system for your organization. If you submitted, for example, an Add Location request that has not yet approved or something for your organization that is showing as a pending request, you are not able to do Add Location. If you try to add a location with a pending request, you will receive a message stating your organization has changes that are pending approval, edits are unavailable until these changes have been approved. For the demo, our organization is Listed and there are no pending requests for the organization. So, we are going to go ahead and add a new location. You select the Add Location button, and that takes you to the Add Location page. Once you're on the Add Location page, you are going to enter a unique name for your location. The unique Location Name that you enter will display on the Find Local Help Consumer Tool, so be sure this is the name you want your consumers to see and the name they will recognize. We're going to enter ETO Training 7 as our new location.

The Assister Type, Coverage Type, Service Location State, and Counties for your organization automatically populate from what is in the system for your CDO or Navigator Grantee organization.

Addresses, any locations that you are adding, the addresses can only be added for any states that are listed for your Service Location State. We're next going to select, I'm sorry, we're going to enter the Address. And you'll see when you select the drop down for your states, only those that are associated with your organization will come up.

You're going to select your Display Settings and we are going to want to show the full address on the map in the Consumer Tool. If you hide or select the partial, they will not be mapped in the Consumer Tool.

You're going to enter your Contact Information. The only required piece is the Main Phone number, however, any additional contact information you can add is always helpful.

You can select any Specialized Services that you may offer at this location and any additional Languages you may offer at this location.

You're then going to select your Hours of Operation, which are required. You need to indicate when you're available to assist consumers at this location. We are going to say 9:00 to 5:00 Monday and Tuesday. You can also enter Split Hours, for example, if you are not available from 5:00 to 7:00 but are back again at 7:00 on Tuesdays, you can add those hours in here as well.

If you have any Special Instructions, you would add that in the box at the bottom, for example, if you want your consumers to use the side entrance, that would appear as special instructions on the Consumer Tool.

Next, we're going to select what you want to do. If you want to select Back, the information will not be submitted that you have entered, and you will return to the FLH Listing(s) page. If you select Logout, you receive a message to confirm your logout, the system returns you to the Add Location page and if you say Yes, then you are returned to the Welcome page without any information being submitted.

If you select Submit & Add, you can add another location. You can add several locations in one session. It will submit what you've just added, and this page will reset for you to add another location.

And if you select Submit, this will submit your request and return you to the FLH Listing(s) page, For the demo we are going to select Submit. So, when we come back on the listings page and look at the table, you can see that we added ETO Training 7 and the add has been requested.

You can also add multiple locations with the same location name with different addresses. So, your organization may have, for example, Planned Parenthood, every location may be named that, but they have different addresses. If the Location Name already exists in FLH for your organization or a request was previously submitted for this Location Name, you will receive a Warning message when you submit the request. And I'm going to demo what will happen in this case. So, we're going to add again ETO Training 2, the same name, but a different address.

So, we're going to do Add Location, same name, different address. And then you continue adding your other information and Submit. Once you select Submit, you're going to get a Warning message just to let you know that it's a duplicate location name, in case you type something in error, so it's telling you the name of the location is identical to at least one other location for the organization, how would you like to proceed? Did you make an error, do you want to change the Location Name, or do you want to continue with that duplicate name? We are going to Continue with Duplicate Name. This will take you back again to the FLH Listing(s) page, and it will show you that we added the same name, ETO Training 2, but a different address.

Now what you cannot do is add locations with the same location address. If the address already exists in FLH for your organization or a request was previously submitted for this address, you will receive an Error message when you submit the request. And I'm going to demo this as well. So, we're going to add -- let's see -- training 8. We will add with the same address as somebody else listed on here. We are going to then complete the rest of the information and Submit. Oh, I apologize. I made an error there. As you can see what happens if you don't have the full amount of digits for your phone number it is going to stop you. You are going to Submit, and you receive your error. This is telling you that you have entered an address that already exists for this organization, and locations with the same address are not allowed. Same name, different address is okay. Different name, same address is not. So, it takes you back to the Add Location page in case you made an error. So, we're going to change, say oh, yes, I did make an error, this is supposed to be 130 Main Street and you can Submit the correction. And you'll then come back to your FLH Listing(s) page again and you'll see that it's been added.

Email Communication

Now for each Upkeep Tool request that you submit, you will receive an acknowledgment email with a confirmation number and a second email upon approval or rejection, once your request is processed. You are kept informed of your request from start to finish. You may also be contacted via email if additional information is needed to process your request. So please be sure to check your spam or junk folder for these emails if you do not see them.

Viewing a Location

The next thing I would like to show you is just viewing a location. So, we're going to go into one that is already listed just to view in case you want to check the address or check anything on it. You're going to select the link and just take a look at the information. This is your View Location page. Take a look at the information and then select Back. If you select Logout, anything that you've tried to submit during this,

oh I'm sorry, tried to request during this session will be lost, any information you entered. So, you want to select Back, and it will take you back to the FLH Listing(s) page.

Listing/Unlisting a Location

Next, we would like to show you about listing or unlisting a location. We talked about listing and unlisting your organization, but this is listing or unlisting a particular location for that organization. So, you can see for ETO Training 2, it's Unlisted right now on the Consumer Tool, so we want to list it. It might be a seasonal place that maybe is only available a few months a year. So, you're going to select the list/unlist or the list icon which looks like a little eye, and you're going to say I'd like to list this now. It asks you are you sure and you say Yes. Now, we are going to take a look at one that is Listed, and we want to unlist this. Again, same icon, we are going to unlist. It is going to say, are you sure and Yes, we are. And that will show as an Unlist Requested. It will show Unlisted status in the table, and it does remove it from view on the Find Local Help Consumer Tool. However, the removed location remains visible and accessible in this table, as you can see, as you saw before there was an unlisted one, so that in the future, if you need to list it again, it will still be there for you to do that.

Editing a Location

Next, I would like to show you how to edit a location. To edit a location, you just select the Pencil icon under the Action column. You take a look at the information to see maybe what you want to edit. Perhaps you want to edit your Operating Hours for this location. Maybe now you're only going to be there until 2:00. You can make that change and Submit. You'll see that a change was requested for that location in your locations table.

Recalling a Request

Now if you decide, I made that change in error, I want to recall that before it gets processed, as long as it is in the Requested stage in the Status column, you can recall your request. Select the Recall icon in the Action column, it asks, "are you sure?" We're going to say "Yes" and that will recall that request. So, you can see there is no longer now a change requested there.

Deleting a Location

If you want to delete a location, you would select the Trashcan icon. You can permanently delete a location that is in and Unlisted status on the locations table. Deleting a location will remove it from the locations table and on the Find Local Help Consumer Tool as well. To delete a location, any that are listed or not listed, you can select the delete, "are you sure you want to delete?" "Yes, I am", and it was deleted.

Adding/Editing an Organization Acronym

As I mentioned earlier, the other item that you can change on the FLH Listing(s) page is your Acronym, if you have one for your company. If your organization has an acronym commonly recognized by consumers for your organization's name, you can add or edit the Acronym in the organization table at

the top. It will show on the Find Local Help Consumer Tool, for example. So, for example, the organization name here is ETO Org, but they may be known as just ETO, so that is their Acronym. If they would want to change this, you select the Pencil, make a change, or delete it. You can remove it if you'd like, select Save, and your request will be -- oh, it's telling me something is pending, so we cannot edit that right now.

Viewing Submission Confirmation

You can then view any of your submissions you did in this session with the View Submission Confirmation button at the bottom. Just like that.

This will give you the Confirmation number, it will let you know that an acknowledgement email has been sent to the leadership contact that submitted the request. It also gives you information of who to reach out to and it tells you all of the requests within this session that you just did. You can select to Print your PDF or save your PDF, and once you have done that, you then can select to Logout. You are finished at this point. You're going to select Logout, it will bring you back to a clean Welcome page that you can go back in and view anything, or if another leadership contact wants to go in to view anything.

This concludes our demonstration video.