Community Benefits Filing Website – Instructions

Contents

SECTION 1: REGISTRATION

Requesting an Account

- Please visit the [AGO Community Benefits website](#) and click on "File Community Benefits report." Then click on "Request Access to Site" to request a Community Benefits filer account.
- Fill out all requested information, including the name of the hospital or HMO for which you will be filing a report.
- In the "Name of Hospital/HMO" field, you have the option of naming a Health System instead of an individual hospital or HMO.
    - Please provide the name of a Health System in this initial registration only if you file on behalf of multiple hospitals/HMOs within the Health System.
    - For users who file on behalf of one hospital or HMO, please provide the name of that hospital or HMO (even if the hospital or HMO is affiliated with a Health System).

- If you would like to be designated as the "Super User" for your organization (please see below), email CBAdmin@mass.gov at the time you submit your account request.
- Once your account is approved and activated, you will be notified by email.
- Upon logging into the system for the first time, you will be prompted to set up account security questions.

Super User Option

- Each organization has the opportunity to identify one "Super User" for the organization who will have the ability to manage other user accounts within the organization.
- If you would like to identify a Super User for your organization, please email CBAdmin@mass.gov to indicate the individual who should be the designated Super User.
- When logging into the website, Super Users will see a "Super User" tab in which they can view and disable/enable user accounts for their organization.
- To create new user accounts for individuals within your organization, please direct individuals to the registration instructions above.
- If you are a Super User who has registered with a Health System (i.e., you file for multiple organizations within a Health System), you will be able to manage other users who are also registered to that Health System, but you will not be able to manage users for individual hospitals or HMOs affiliated with the Health System.
- An organization does not need to have a Super User. This is an option added at the request of filers to facilitate account management for organizations with multiple users of the Community Benefits filing website.
- An organization cannot have more than one Super User.

SECTION 2: VIEWING ANNUAL REPORTS

- After logging in, click on the "Annual Reports" tab to see your hospital or HMO's Community Benefits reports since 2001. Each report has an associated status:
  - "Draft" is the initial status of the report. The report remains in draft until it is submitted to the AGO.
  - "Submitted" means that the report has been submitted to the AGO, and it has not yet been published.
  - "In Revision" means that the AGO has re-opened a previously submitted report for revision.
  - "Published" indicates that the report has been published by the AGO.
- Double click on a report to open it in a new window.
- You can navigate to different sections within the report by clicking on the tabs at the top of the page (e.g., Organization Info, Programs, Expenditures, etc.).
- Note that you are only able to save changes to reports that are in "Draft" or "In Revision" status.
- If you need to edit a submitted report, please see "Unlocking your Report" below.

SECTION 3: EDITING REPORT SECTIONS

Organization Info

- This is the first tab of the Annual Report, and it contains fields related to the organization and the communities it serves.
- If the organization has previously submitted a report to the AGO, basic information about the organization will pre-populate in the Organization Info tab. You can edit this information if there have been any changes.
- If the name of your organization has changed, please contact the AGO Community Benefits staff at CBAdmin@mass.gov
- The "Community Health Network Areas" and "Regions Served" fields allow you to choose from multiple options. Please see Section 4 for help on how to use this feature.

Mission and Key Planning/Assessment Documents

- This tab includes fields related to the organization's Community Benefits mission and process. This is also where to upload key Community Benefits key planning documents.
- To add a target population, click the + sign on the upper right of the "Target Populations" box. This will open a new window in which you can specify the name of a target population and the basis for selection. Click "Save" to add this target population to the report.
- Immediately below the "Target Populations" box, indicate where the target populations for your Community Benefits investments are publicized by checking the appropriate boxes (Marketing Collateral, Annual Report, and/or Website). If you click 'Website,' you may then enter text in the "Hospital/HMO Web Page Publicizing Target Populations" field.
- The "Data Sources" field allows you to choose from multiple options. Please see Section 4 for help on how to use this feature.
- You may upload Key Planning Documents (e.g., Community Health Needs Assessment, and Implementation Strategy and Self-Assessment documents) to your annual report by clicking on the upload buttons in this tab and attaching the files.
- Any uploaded file will retain its original file name.
- Files are limited to 30 MB. If you need to upload a larger file, please contact the AGO.
- Please use the upload buttons in this tab to manage the documents in your report. The "Documents" button at the top of the main screen will not allow you to manage the documents associated with your report.

Programs

- The Programs tab of the report is where to list your organization's Community Benefits programs.
- To add a new program, click the + sign on the upper right of the "Programs" box which will open a new window in which you can specify program details, such as the program type, program partners, program goals, and details about the program target population.
- Click "Save" to add this program to the Programs list.

- You can click on individual programs in the program list to view or edit individual program details.
- Note that the Programs list defaults to an alphabetical listing of programs.
- To re-order the programs, enter a number in the "Sequence" field in the individual program window.
- Note that any program in which the "Sequence" field is left blank will be listed first, followed by additional programs in sequential order. Programs with the same sequence number will be listed in alphabetical order.
- In order to add a program goal, click the + sign on the upper right of the Program Goals box to open a separate window in which you can enter the goal sequence, goal description, and goal status.
- Program Goals can be re-ordered in the same way as Programs.
- Click "Save" to add the new goal to the list of Program Goals.
- To add a program partner, click the + sign on the upper right of the Partners box to open a separate window in which you can enter the Partner Name and Description and the Partner website.
- Click "Save" to add the new Partner to the list of partners for this program.
- Many of the program fields allow you to choose from multiple options. Please see Section 4 for help on how to use this feature.

Expenditures

- The Expenditure tab of the report is where to information about the organization's Community Benefit Program and Charity Care Expenditures.
- The report automatically calculates the total and subtotal fields.

Optional Information

- This tab is where to report information on an optional basis, including: bad debt information for hospitals, an optional supplement, and a link to a publication that describes your Community Benefits Initiatives.
- For hospitals, click the "Bad Debt Certification Box" to certify compliance with the recommended hospital debt collection practices detailed in Appendix II of The Attorney General's Community Benefits Guidelines for Non-Profit Hospitals. When the box is clicked, you will then have the option to report a number in the "Bad Debt" field.
- If you choose to include a link in the "Optional: Link to hospital/HMO publication describing Community Benefits initiatives" field, please copy and paste a complete URL, e.g., https://www.state.ma.us

Submit to AGO

- When you are ready to submit your report, navigate to this tab and click the checkbox indicating that you are ready to submit. You must then click "Save" to submit the report to the AGO.
- After you click "Save", your report will be submitted to the AGO

- If any required fields* have been left blank, you will be notified by a pop-up window at this time. Uncheck the checkbox indicating that you are ready to submit the report and go back to the relevant report tabs to complete the required fields and then re-submit.
    - ○ * Required fields for the reports include:
        - ➢ An organization's Community Benefits Mission Statement
        - ➢ Community Health Needs Assessment and Implementation Strategy information
        - ➢ At least one target population for the organization's Community Benefits programs
        - ➢ A program name, program description, and at least one goal and associated goal status for each program
- Once the report has been submitted to the AGO, you will be able to view it but will not be able to edit the report. It may appear as if you are able to edit submitted reports, but changes will not be able to be saved.

Notes

- At your option, you may use this tab to write notes to yourself or your colleagues as you work on the Annual Report.
- These notes do not become part of your published report.

SECTION 4: ADDITIONAL SITE FUNCTIONS

Importing information from previous report

- There are fields throughout the report that give you the option to import data from your organization's previous year's report, if applicable.
- You will see a gray button indicating this capability for the relevant fields.
- To import data from last year's report, click on the import button associated with the field you wish to import.
- Note that the import button on the program tab imports the list of last year's programs and program descriptions, but not additional program details. You must open each program to import additional data and complete the fields.
- To import program details, double-click on the program and then either select "Import all fields from selected program from last year to import all program details or select the specific program fields that you would like to import by clicking the gray import buttons associated with the relevant fields.
- Note that if you choose to import all fields for a particular program, the "Goal Status" field for each goal will not be imported. This field must be updated annually. Please be sure to complete the "Goal Status" field for each goal listed.
- If you choose to use the import function to import data from last year's report, please be sure to update the imported data with information specific to the current report. Please also confirm that all program information is complete.
- Note that even if all program data is imported, the prior year's entry may be missing information, so please be careful to fill out all relevant fields for each program.

Fields with multiple selection options

- There are fields throughout the report that allow you to create a list that includes multiple selections.
- Click on the green + sign to navigate to a new pop-up window that will list all the options for a given field.
- Select the desired options from the list and then click on the + sign to close this window and add the selections to the report.
- For fields with many options, you can also use the search box at the top to search for a specific selection. Note that you need to enter an exact term or to include an * before and after the search term.
- To remove a selection from a list, highlight the selection and then click the blue button at the top right of the box, immediately to the right of the + button.

Saving your report

- Remember to save your report frequently as you work.
- If you leave your report idle for several minutes, you will need to log in again and you risk losing unsaved data.

Viewing and printing your report

- At any point in the preparation of your report, you can click on the Review/Print button on the right side of the screen to view a consolidated report that includes all report sections.
- To print the report, right click on the consolidated report and select Print.
- Note that the print button at the top of the screen will only print the current screen so the Review/Print button on the right is the recommended way to print a complete copy of your report.

Unlocking your report

- If you need to edit a report after it has been submitted, you can request that your report be unlocked by clicking the "Request report be unlocked for editing" button on the right of your screen. and alerting the AGO to the reason for your request at CBAdmin@mass.gov.

For further questions, please contact the AGO at CBAdmin@mass.gov or use the "Contact Us" tab on the main screen