

# Flex Forum Access and Usage

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This document will guide users through setting up an account and using the new Flex Program Forum (the Forum). Questions or requests to gain access to the Forum can be directed to: [flex-forum@ruralcenter.org](mailto:flex-forum@ruralcenter.org). The Forum can be found here: <https://ruralcenter.sharepoint.com/sites/Flex-Forum>.

## Definitions

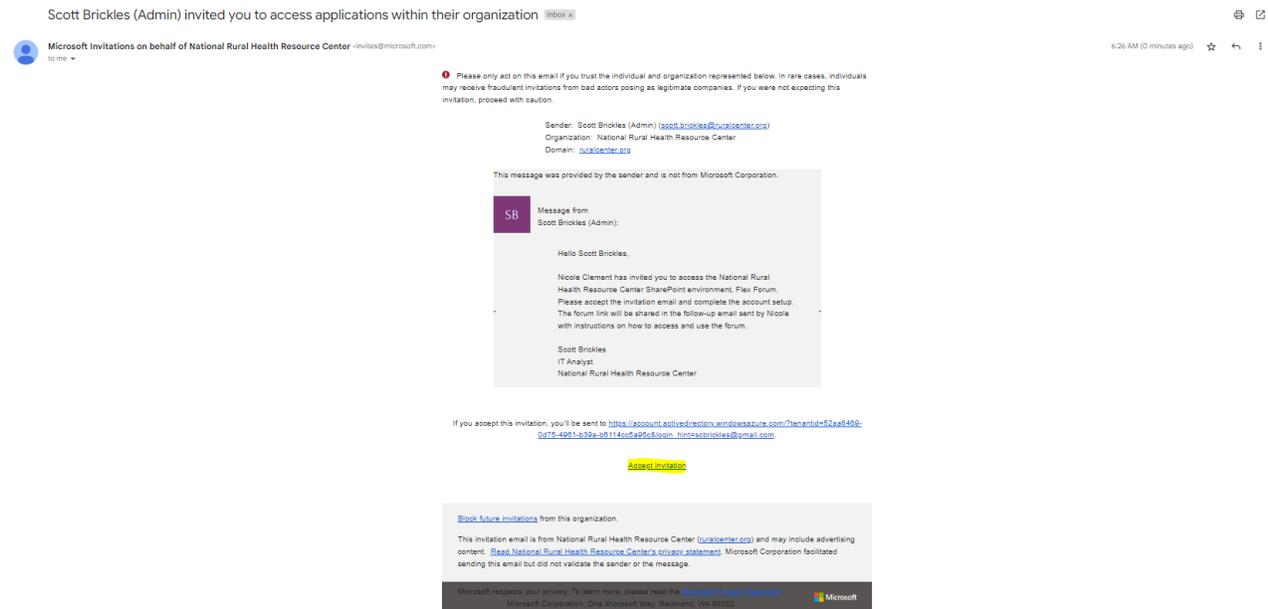
- **New Users** are those that have not had previous access to any external SharePoint space with TASC or other programs of the National Rural Health Resource Center, which would occur when participating in TASC events such as a Flex Program Workshop or a learning collaborative. If you've received an invite email, please continue to the Account Setup section below.
- **Current Users** are those that have previously used an external SharePoint space with TASC or other programs of The Center. If you've used these other SharePoint resources, continue to Flex Forum Usage section on page 5. When you access the site, you will be asked to sign in.

## Account Setup:

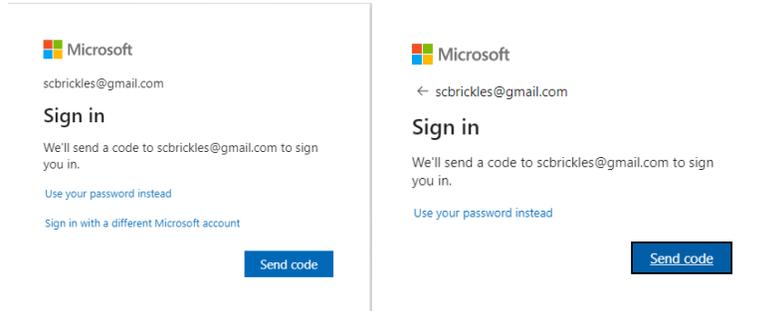
The account setup steps only pertain to **New Users** to The Center's SharePoint environment. Current Users can proceed to the Flex Forum Usage section on page 5.

You will receive an email invitation from Microsoft on behalf of the National Rural Health Resource Center.

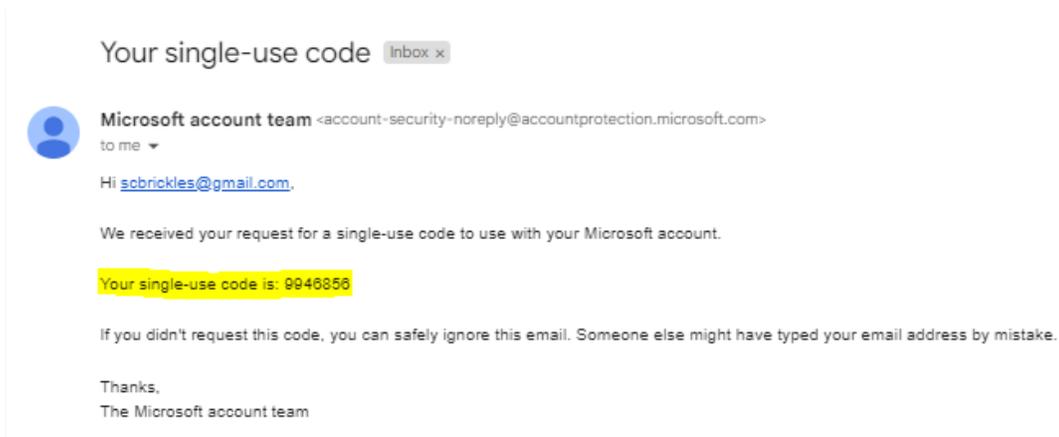
- 1) New users can expect an email invite like the one below. Users will be directed to a page to finish setting up their accounts. *Click, Accept Invitation.*



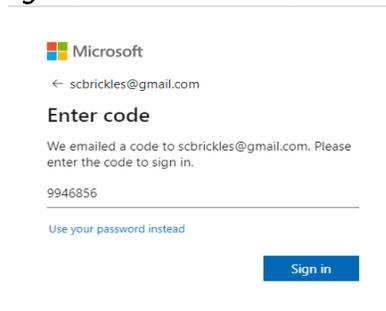
2) After clicking “*Accept invitation*,” a dialog box like one of these two will appear. You have two options, *use your password instead* or *send a code* to the email address to verify your identity.



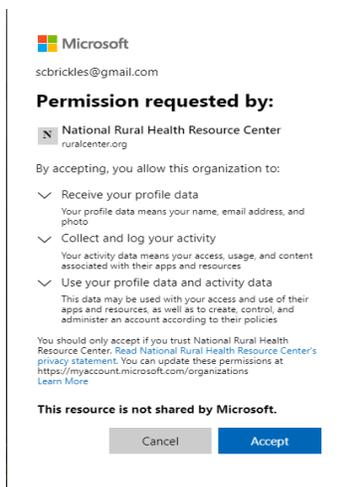
- a) If your organization uses Microsoft 365 or G-Suite, you can click *Use your password instead*. This will redirect you to a page asking you to enter the login information related to that account.
- b) Otherwise, *Click, Send code*. A temporary security code will be sent to the email address to verify access to the email address the invitation was sent.
  - i) An email containing a unique temporary code will be sent to the email. Locate the code so it can be used in the next step.



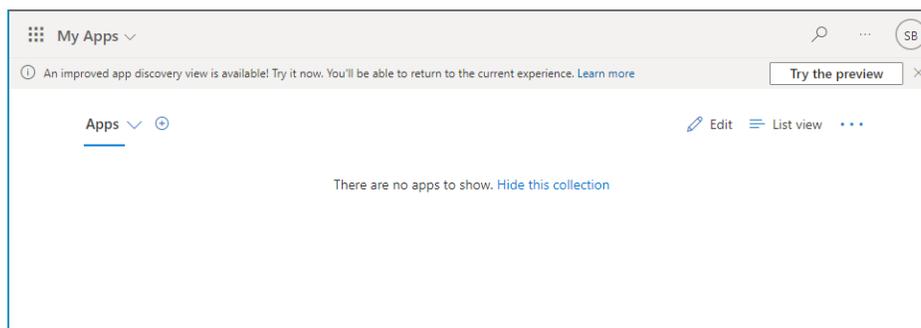
ii) Enter the code on the site. *Click, Sign in*.



- 3) While a user signs in a dialog box will occasionally appear asking if you wish to Stay signed in. This is your personal preference. Click Yes or No accordingly.
- 4) A standard permission request will pop up on your screen, telling you the kind of information the National Rural Health Resource Center will collect for the safety and security of all users. This data is not shared outside the organization. **Click, Accept,** to continue to the final part of the account creation.



- 5) Users will be accepted into a window called My Apps. It may appear blank. You now have access to the Forum. Continue to the next section titled Flex Forum Usage.



## Flex Forum Usage

Now that your account has been set up, it is time to access the Forum. Click this link to access the Forum: [TASC Flex Forum - Home \(sharepoint.com\)](#). You may be prompted to sign into your account. If you are unable to access the site, please email [tasc@ruralcenter.org](mailto:tasc@ruralcenter.org).

1) Welcome to the Flex Forum home page:

**TASC Flex Forum**

Home  
Documents  
State Contact Information...  
Core Competencies  
Flex Fundamentals Guide  
Recycle bin

**TASC**  
Technical Assistance  
& Services Center

**Flex Program Forum**

Welcome to the Flex Program Forum! The Flex Program Forum is for content related to the Medicare Rural Hospital Flexibility (Flex) Program and rural health care. On the Flex Program Forum, please share information, pose questions, post documents, and web links, and comment on each other's posts. This forum is just one other method for state Flex Programs to connect and share information, ideas, lessons learned, and best practices with each other.

The Flex Program Forum is maintained by the Technical Assistance and Services Center (TASC), a program of the National Rural Health Resource Center. Access to this forum is restricted to Flex Coordinators, State Office of Rural Health Directors, Flex Program Directors, other Flex personnel as indicated by the state Flex Program, the Federal Office of Rural Health Policy, the Flex Monitoring Team, the TASC/SHIP Advisory Council, and staff of the National Rural Health Resource Center.

If you have questions about the Flex Program Forum, please contact the TASC staff at [tasc@ruralcenter.org](mailto:tasc@ruralcenter.org) or (877) 321-9393.

**Resources**

- Documents
- Flex Virtual Knowledge Group (VKG) Webinar Recordings (YouTube)

**Start a discussion**

- General Information
- Emergency Medical Services
- Balancing the Flex Coordinator Role
- Evaluation
- Financial and Operational Improvements
- Innovative Health Care Models
- Leadership
- Medicare Beneficiary Quality Improvement Projec...
- Population Health Management
- Quality Improvement
- SHIP Grant Management
- Core Competencies

**Questions about the Flex Program Forum**

Email: [flex-forum@ruralcenter.org](mailto:flex-forum@ruralcenter.org)  
Phone: (877) 321-9393

2) On the left side of the screen there are navigational links that will be accessible anywhere on the site.

**TASC Flex Forum**

- Home
- Documents
- State Contact Information...
- Core Competencies
- Flex Fundamentals Guide
- Recycle bin

- **Home** is the Forum main page. This link takes you to the Forum home page.
- **Documents** takes you to the documents folder for this SharePoint site. Share documents with other Forum users.
- **State Contact Information & Flex Profiles** this link takes you to The Center's website, State Contact Information & Flex Profiles.
- **Core Competencies** this link takes you to The Center's website, Core Competencies for State Program Excellence resource.
- **Flex Fundamentals Guide** this link takes you to The Center's website, Flex Program Fundamentals Guide.

3) Under Resources in the center of the page, there are three buttons.



- **Documents** takes you to the documents folder for this SharePoint site. Share documents and with other Forum users.
- **Flex Virtual Knowledge Group (VKG) (YouTube)** is a link that makes all the Flex VKG recordings easily accessible in a dedicated playlist on YouTube. The recordings are ordered from newest to oldest.
- **MBQIP VKG (YouTube)** is a link that makes all the MBQIP VKG recordings easily accessible in a dedicated playlist on YouTube. The recordings are ordered from newest to oldest.

4) On the right side of the page are the discussion categories, which each open a separate discussion board. All the discussion boards function the same way.



## Creating a Post

- 1) To create a discussion post, pick one of the available categories and click on it.
- 2) Click on **+new discussion**.



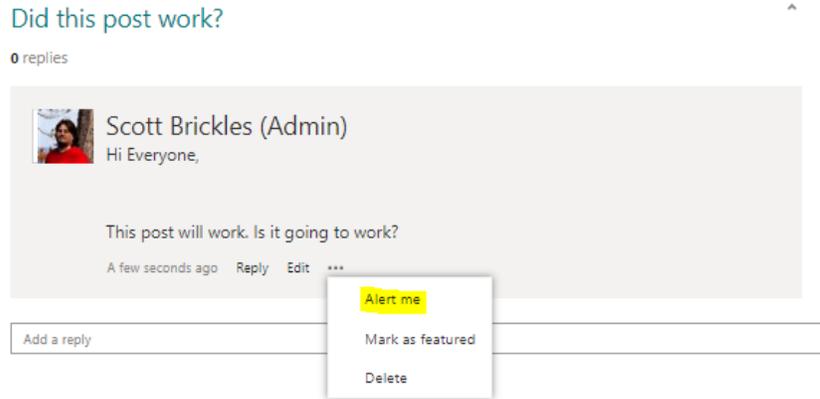
- 3) Give the post a subject and fill out the body. If you are asking a question, click the checkbox to let users know you are looking for answers.

- If you include a URL in your post, it may or may not automatically hyperlink. To manually hyperlink it, click **Insert** at the top left corner, and then click **Link** and paste your URL into both of the fields on the **Insert Hyperlink** box that comes up (right lower screen shot).
- If you would like to include a file on your post, click **Insert** at the top left corner, and then click **Upload File**, and then click **Choose File button** on the **Add a document** (left lower screen shot) find the file you .

Click Save.

The top screenshot shows the editor's 'INSERT' tab with 'Link' and 'Upload File' options highlighted. The main editor shows a subject field with 'Sustainable Rural EMS: Navigating Change' and a body field with a URL. A 'Question' checkbox is present but unchecked. The bottom-left screenshot shows the 'Insert Hyperlink' dialog with 'Text to display' and 'Address' fields. The bottom-right screenshot shows the 'Add a document' dialog with a 'Choose File' button and a 'Destination Library' dropdown set to 'Site Assets'.

- 4) While within a post from a user, you can be alerted whenever there is an update to the individual post by clicking Alert me, found under the three dots. An alert will send you email notifications per your preference.



- 5) To set up the alert, it will need a title, a contact, an email address when to be alerted, and what types of changes to alert you about. By pressing OK, the alert will be created and confirmed.

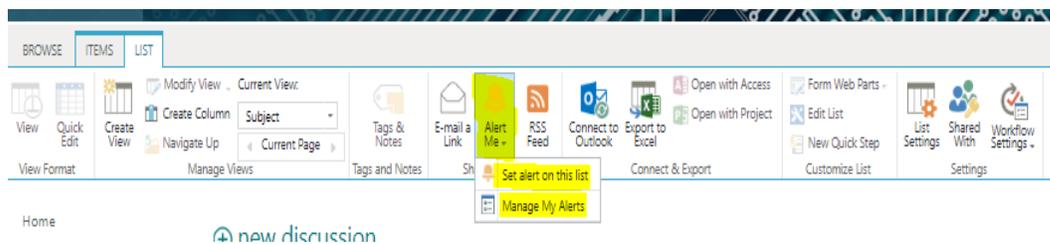
### New Alert ⊙

<p>Information</p> <p>5</p> <p>encies</p> <p>ntals Guide</p>	<p><b>Alert Title</b> Enter the title for this alert. This is included in the subject of the notification sent for this alert.</p> <p><b>Send Alerts To</b> You can enter user names or e-mail addresses. Separate them with semicolons.</p> <p><b>Delivery Method</b> Specify how you want the alerts delivered.</p> <p><b>Change Type</b> Specify the type of changes that you want to be alerted to.</p> <p><b>Send Alerts for These Changes</b> Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.</p> <p><b>When to Send Alerts</b> Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)</p>	<p><input type="text" value="General Information: Did this post work?"/></p> <p><b>Users:</b> <input type="text" value="Scott Brickles (Admin) x"/></p> <p><b>Send me alerts by:</b></p> <p><input checked="" type="radio"/> E-mail <input type="text" value="scott.brickles@ruralcenter.org"/></p> <p><input type="radio"/> Text Message (SMS) <input type="text"/></p> <p><input type="checkbox"/> Send URL in text message (SMS)</p> <p><b>Only send me alerts when:</b></p> <p><input checked="" type="radio"/> All changes</p> <p><input type="radio"/> New items are added</p> <p><input type="radio"/> Existing items are modified</p> <p><input type="radio"/> Items are deleted</p> <p><b>Send me an alert when:</b></p> <p><input checked="" type="radio"/> Anything changes</p> <p><input type="radio"/> Someone else changes a post</p> <p><input type="radio"/> Someone else changes a post created by me</p> <p><input type="radio"/> Someone else changes a post last modified by me</p> <p><input type="radio"/> Someone changes an item that appears in the following view: <input type="text" value="Subject"/></p> <p><input checked="" type="radio"/> Send notification immediately</p> <p><input type="radio"/> Send a daily summary</p> <p><input type="radio"/> Send a weekly summary</p> <p><b>Time:</b> <input type="text" value="Monday"/> <input type="text" value="6:00 PM"/></p>
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## Managing Alerts for Discussion Boards

Alerts can be set up for discussion boards so that users receive an email notification for specific content they are interested in.

- 1) To set up alerts, click on any discussion board. The ribbon pictured below will appear at the top left corner of the page.
  - i. Click the *List* tab
  - ii. Click *Alert Me*
  - iii. Click *Manage My Alerts*.

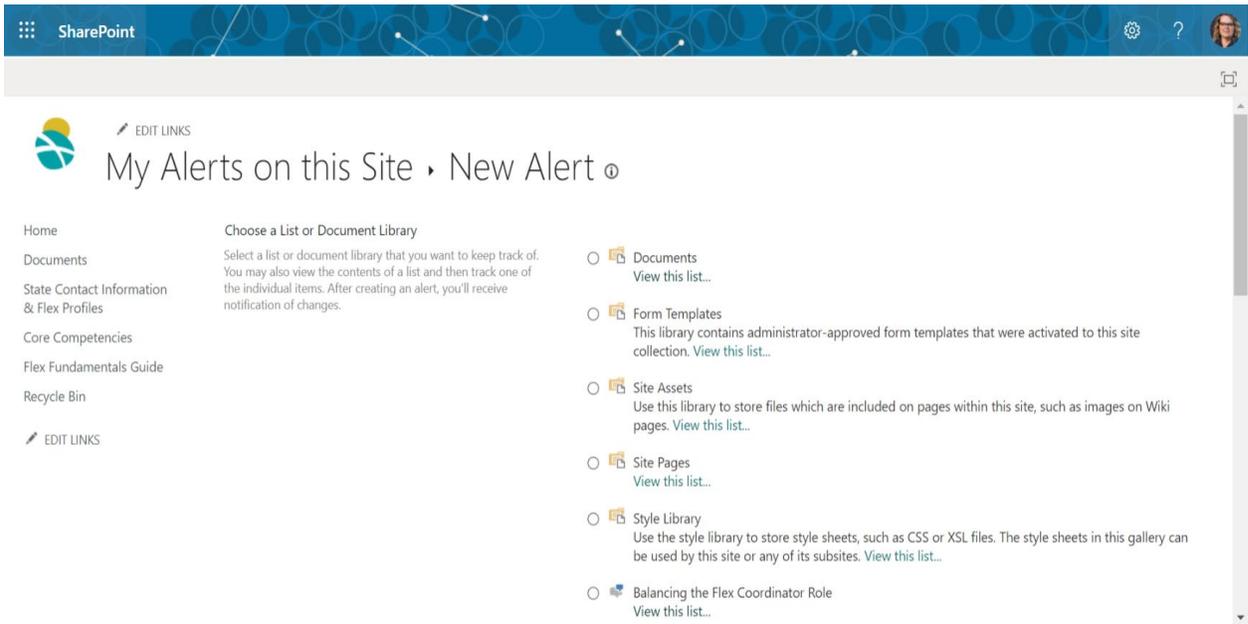


- 2) When you see *My Alerts on this Site* as pictured below, click on *Add Alert*

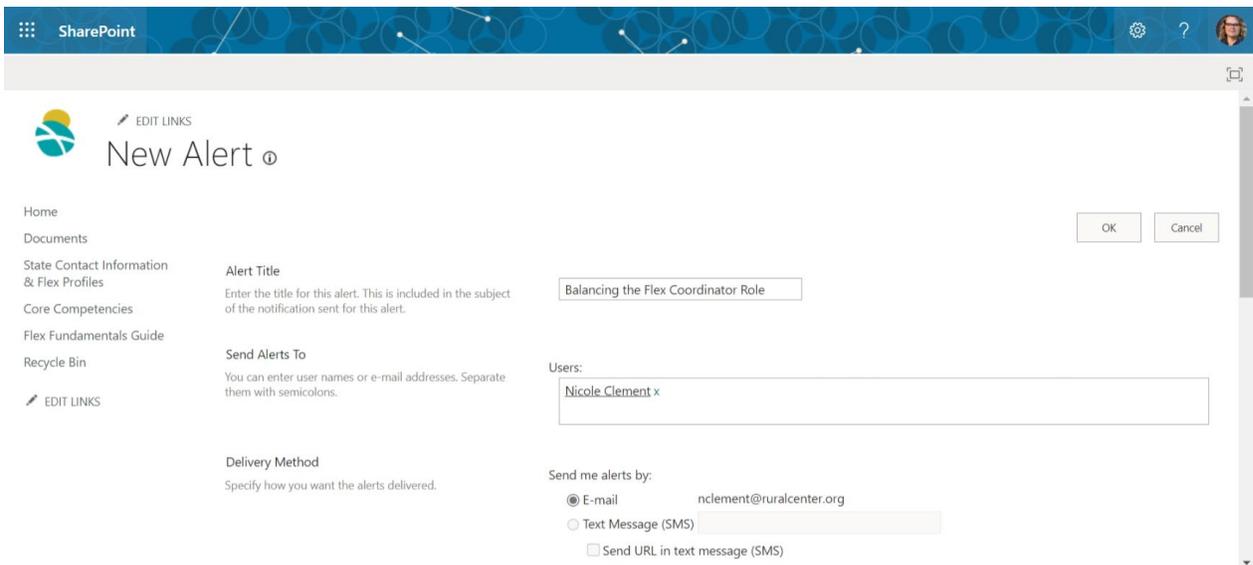
### My Alerts on this Site ⓘ

Add Alert | Delete Selected Alerts

- 3) The next screen (see the top of the next page for a screenshot) will show a list of options for setting up alerts.
  - i. Click the first topic of the discussion board you would like to be notified of changes and then click next at the bottom of the list. Note: You can choose only one at a time.
    - i. The discussion board topics to choose from are:
      1. Balancing the Flex Coordinator Role
      2. Emergency Medical Services
      3. Evaluation
      4. Financial and Operational Improvements
      5. General Information
      6. Health Information Technology
      7. Leadership
      8. Medicare Beneficiary Quality Improvement Project (MBQIP)
      9. Population Health Management
      10. Quality Improvement
      11. SHIP Grant Management



- 4) The next screen will give you options for how you would like to be notified. Make your selections and choose ok. This will take you back to the previous screen where you are able to select another topic to set up alerts for. Keep repeating these two steps until you've set up alerts for each topic you want alerts for.



- 5) To reduce alerts, it is a good practice to clean them up occasionally. By clicking on *Alert Me (Bell Icon)*, users can create more alerts or manage their existing alerts.

