



# **DC PORTAL - HIE ADMIN TOOL**

User Guide

# Table of Contents

○ Managing Existing Users	6
○ Adding New Users	11
○ User Search	19
○ Viewing Account Services	21
○ Provisioning Services	23
○ Password Reset	30
○ Editing User Details	34
○ Glossary	38

1

# Logging In

**First Time HIE Admin Users:** If this is your first time accessing the Tool, refer to your welcome email for instructions. You are required to create a password and set up two-factor authentication on your account. Enter your login credentials in the fields provided.

**Existing HIE Admin Users:**

Log on to: <https://portal.crispdc.org> → “HIE Admin Tool”

**(1a) After logging in,** you will see the screen below. First, let’s verify your users. Select the Accounts tab to begin



**WELCOME!**

User Verification Process

## In the HIE Admin Tool you can:



- Create Users
- Reactivate Suspended Users
- Recreate Deactivated Users



- View Account Services
- Provision Services to Users



- Audit Users
- Deactivate User Accounts for users who leave your organization or no longer require access



- HIE Admins are responsible for adding new users to their account(s), assigning HIE services to their user(s), and auditing each user every 90 days.

# HIE Admin Tool

The Health Information Exchange (HIE) Admin Tool allows HIE Administrators to manage their colleagues' HIE accounts. User account creation, access to specific HIE Services, and employee turnover can all be handled via the tool.

***\*\*Please note, the HIE Admin Tool application will only be visible to users with HIE admin access. \*\****

The screenshot displays the CRISP HIE Admin Tool interface. At the top, there is a header bar with the CRISP logo on the left, a search bar with the placeholder text "Search..." and a blue "SEARCH" button on the right, and a user profile icon labeled "JOI PERRY" with a dropdown arrow. Below the header is a navigation bar with links for "HOME", "ACCOUNTS", "USERS", and "ADD USERS". The main content area features a "WELCOME!" heading followed by the text "A place where you can easily find solutions and ask questions". Below this is a section titled "User Verification Process" in blue. The text in this section states: "Every 90 days, HIE Administrators must verify each HIE user within their organization. To ensure your patients and their health information are protected, please use this platform to determine whether or not members of your organization should maintain access to HIE resources. Please note, if an HIE user is not verified within the 90-day period, their access to HIE tools will be suspended. For questions, support, or troubleshooting issues, please contact the Customer Care Team for your region:". This is followed by contact information for MD/DC (1.877.952.7477 or [support@crisphealth.org](mailto:support@crisphealth.org)), WVHIN (1.844.468.5755 or [wvhinsupport@crisphealth.org](mailto:wvhinsupport@crisphealth.org)), and Connie (1.866.987.5514 or [help@connect.org](mailto:help@connect.org)). At the bottom, a paragraph instructs users to verify their users by clicking on the Account tab, finding the organization, and pressing the Audit button.

**CRISP** Search... SEARCH JOI PERRY ▼

HOME ACCOUNTS USERS ADD USERS

**WELCOME!**  
A place where you can easily find solutions and ask questions

**User Verification Process**

Every 90 days, HIE Administrators must verify each HIE user within their organization. To ensure your patients and their health information are protected, please use this platform to determine whether or not members of your organization should maintain access to HIE resources. Please note, if an HIE user is not verified within the 90-day period, their access to HIE tools will be suspended. For questions, support, or troubleshooting issues, please contact the Customer Care Team for your region:

MD/DC at 1.877.952.7477 or [support@crisphealth.org](mailto:support@crisphealth.org)  
WVHIN at 1.844.468.5755 or [wvhinsupport@crisphealth.org](mailto:wvhinsupport@crisphealth.org)  
Connie at 1.866.987.5514 or [help@connect.org](mailto:help@connect.org)

To verify your users, click on the Account tab above, find the organization for which you are auditing users, navigate to that page, and press the Audit button in the upper right corner of the screen.

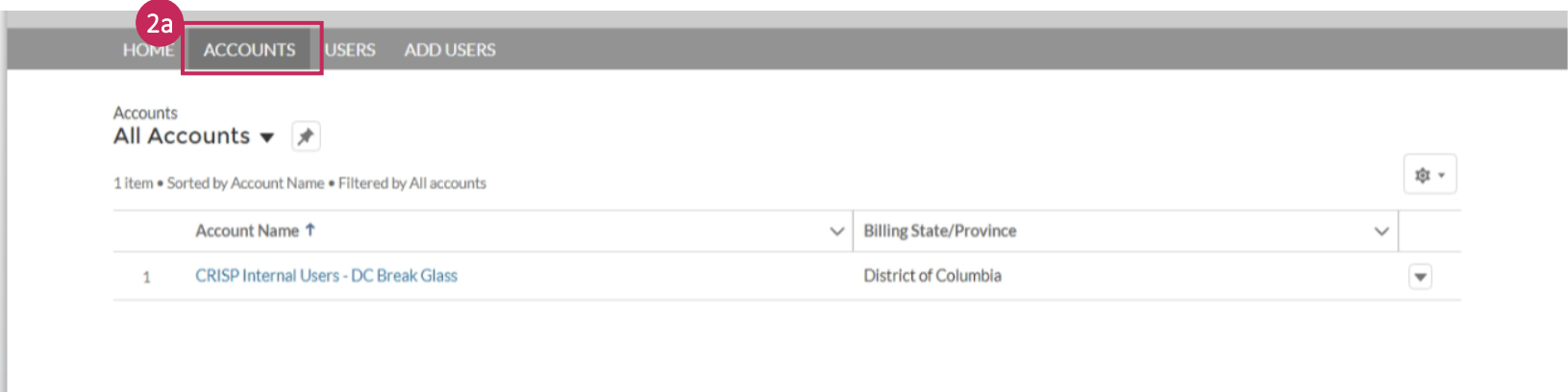


# Managing Existing Users

2

Managing Existing Users - Audit

- a)
- Select the **Accounts** tab. The accounts affiliated with your account will be displayed below. Select the organization.
- b)
- Click on the **User Audit** button.



2

Managing Existing Users - Audit

- c)
- Click the **Approve All** button if there is no change to your user list. Users can be manually audited by clicking on the **Approve/Deny** button next to the user’s name.
- d)
- Click the Complete Audit button. You will be directed to a confirmation page. Review the confirmation and select **Finish**.

Active Users

2c

Approve All

Status	First Name ↑	Last Name	Email	Member Title	Department	Audit Date	Audit By
Approve Deny	Aida	Semere	aida.semere@crisphealth.org	Nurse Practitioner		2021-12-16	Anitra Shird MD-DC
Approve Deny	Bracha	Orlansky	bracha.orlansky@crisphealth.org	Physician, Resident		2021-12-16	Anitra Shird MD-DC

HIE Admin - User Confirmation Page

Deactivated Users

Name	Owner Name
No Record Available	

Active Users

Name	Owner Name
Joi Perry	Rex Echevarria

2d

Previous

Finish



3 Suspended Users

- a) To work with suspended users, ensure the *Suspended User* tab is selected
- b) If *Suspended Users* are present, select the appropriate indicator to *Approve* or *Deny* the user. If *Denied*, the user account will be revoked
- c) At this point, select *Complete Audit* to review your selections

NOTE: Users in suspended status for 30 days will be deactivated. If a suspended User is approved, remind the User to reset their password if unable to log in.

3a

Active User Suspended User

Suspended Users Approve All

Status	Name	Email	Member Title	Department	Audit Date	Audit By
3b <span>Approve</span> <span>Deny</span>	Laughter Ajibade	laughter@test.com	Nurse Practitioner		2021-03-16	2021-03-16
<span>Approve</span> <span>Deny</span>	Peter Shay	shay@test.com	Physician, Intern		2021-03-17	2021-03-17
<span>Approve</span> <span>Deny</span>	Test Thu1	testthu1@test.com	Dentist		2021-03-17	2021-03-17
<span>Approve</span> <span>Deny</span>	Nick Redfurn	nick@test.com			2021-03-18	2021-03-18
<span>Approve</span> <span>Deny</span>	test singleuser	test@sunuser.com	Dentist		2021-03-18	2021-03-18

3c Complete Audit Cancel

4 Deactivated Users

Users not audited in 120 consecutive days will be deactivated. Deactivated users must contact CRISP-DC Support, [support@crisphealth.org](mailto:support@crisphealth.org), to reactivate their account.

5

Confirming  
an Audit

- a)
- Upon clicking *Finish*, you will see the *Success* prompt
- b)
- You have successfully managed your users



HIE Admin - User Confirmation Page

Deactivated Users	
Name	Owner Name
No Record Available	

Active Users	
Name	Owner Name
Anitra Shird	Outreach Team
Tammy34 bobby34	Outreach Team

Previous

5a

Finish

5b

Success

All records Successfully Updated



# Adding New Users

6

Adding New Users - Individual

- a)
- Select the **Single User** subtab.
- b)
- Complete the required fields and select the **Submit** button. **Please note: Portal (AK, CT, WV) should be selected for all new users.** For licensed users, State license, professional license number, license type, NPI and DEA (for users requesting PDMP access) are required.

HOME ACCOUNTS USERS ADD USERS

6a

Single User Bulk User

Title

Physician

Organization

--None--

User Type

Portal (AK, CT, WV)

First Name

Mickey

Last Name

Mouse

Email

mmousemd@crisphealth.org

Department

Community Health

State License

DC

Phone

Professional License

DC21655

License Type

Physician

NPI

1800000000

CDS

DEA

6b

Submit Cancel

## CRISP DC Portal HIE Admin Tool – Adding New Users

## 7 Adding New Users - Multiple

- a) To create accounts for multiple users at once; click the **Bulk User** subtab, then **download the Bulk User Template** by clicking on the hyperlink. Add the users to the spreadsheet and save using the instructions on the page.
- b) To upload the file, **Check the Portal box** (Bulk User Template). When you have successfully uploaded your spreadsheet, click **Create Users**. The user list will be displayed in the field below.

[illegible]

8

Submitting a New User & Attestation

- a) Once all required fields are filled out press the *Submit* button at the bottom the form
- b) After you click *Submit*, an attestation screen will appear, acknowledge the terms and conditions by clicking the check boxes then click *Confirm*
- c) A green pop-up message will appear once User has been successfully onboarded (see next slide for error guidance)

Note: It is highly recommended adding the User's organizational email. Personal emails are discouraged.

Single UserBulk UserUnprocessed Users

TitleOther Licensed Healthcare Practitioner

Organization--None--

User Type--None--

First Name

Last Name

Email

Department--None--

State License--None--

Phone

8a

SubmitCancel

Confirm

☒ As a designated HIE Administrator or Point of Contact, on behalf of the above organization, I attest the Authorized User is a member of the organization's workforce and their identity has been verified in accordance with requirements outlined in the HIE policies and procedures as applicable.

☒ I attest that the organization has a copy of the Health Information Exchange (HIE) participation agreement and the corresponding policies and procedures found on the HIE website. In addition, I attest that all Authorized Users have received education or training on the HIE policies and procedures as applicable and have agreed to adhere to those applicable to Authorized Users, including the prohibition against sharing log-in credentials with another individual.

8b

ConfirmCancel

8c

Success

New User created successfully!

9

New User  
Creation  
Error

- a) Reference from previous slide: Once attestations are checked and you click *Confirm*, the system will verify the email address submitted on the new User creation request
- b) Upon attempt to create a new User with an email address that is already in the system, you will receive an error message: **Contact Exists with the given email at a different account**. This could be at an account you manage or another account within the system

Guidance: Search for the User in accounts that you manage – see User Search section. If the User does not exist in an account you manage, you have the option to use a different email address (prefer an email address from your organization) or call HIE Technical User Support Team

Confirm

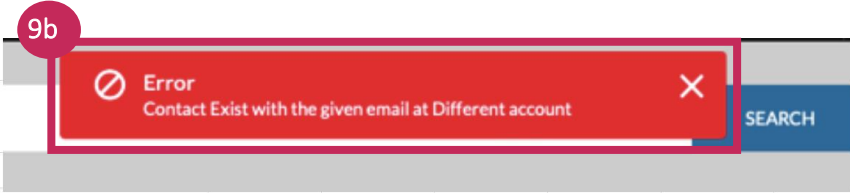
☒ As a designated HIE Administrator or Point of Contact, on behalf of the above organization, I attest the Authorized User is a member of the organization's workforce and their identity has been verified in accordance with requirements outlined in the HIE policies and procedures as applicable.

☒ I attest that the organization has a copy of the Health Information Exchange (HIE) participation agreement and the corresponding policies and procedures found on the HIE website. In addition, I attest that all Authorized Users have received education or training on the HIE policies and procedures as applicable and have agreed to adhere to those applicable to Authorized Users, including the prohibition against sharing login credentials with another individual.

9a

Confirm

Cancel



10 Creating Users

Select *Create Users* to import your list into the HIE database

Single User

Bulk Use

Users

Instructions:

- Please Download Template [Bulk User Template](#)
- Please Save the with .CSV Extension
- Choose a User Type by selecting the appropriate check
- Please use Upload File button to upload users.
- Click Create Users button to create users.
- Check status column for success or error messages.

5.

Create Users

Upload Files

Or drop files

Title	Organization	First Name	Last Name	PDMP Specialty	Email	Phone	Department	NPI	Professio
Scribe	Test Account	Rebecca	Tucker		r.tucker@randatmail.com		Emergency Medicine		
Scribe	Test Account	Martin	Fowler		m.fowler@randatmail.com		ENT		
Scribe	Test Account	Jordan	Perkins		j.perkins@randatmail.com		Family Medicine		
Scribe	Test Account	Tiana	Williams		t.williams@randatmail.com		Gastroenterology		
Scribe	Test Account	John	Baker		j.baker@randatmail.com		General Practive		
Scribe	Test Account	Kelvin	Payne		k.payne@randatmail.com		Home Health		
Scribe	Test Account	Lilianna	Alexander		l.alexander@randatmail.com		Infectious Disease		
Dentist	Test Account	Julian	Cole		j.cole@randatmail.com		Emergency Medicine	1457350365	17156
Dentist	Test Account	Carina	Cunningham		c.cunningham@randatmail.com		Pain Management	1457350365	17114
Dentist	Test Account	Isabella	Stevens		i.stevens@randatmail.com		Family Medicine	1457350365	17166



11

Submitting Updated Users & Attestation

- a) Once you’ve selected Create Users, an attestation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click *Confirm*
- b) A pop up window will show the number of Users created and the number of failed records

Confirm

☒ As a designated HIE Administrator or Point of Contact, on behalf of the above organization, I attest the Authorized User is a member of the organization's workforce and their identity has been verified in accordance with requirements outlined in the HIE policies and procedures as applicable.

☒ I attest that the organization has a copy of the Health Information Exchange (HIE) participation agreement and the corresponding policies and procedures found on the HIE website. In addition, I attest that all Authorized Users have received education or training on the HIE policies and procedures as applicable and have agreed to adhere to those applicable to Authorized Users, including the prohibition against sharing login credentials with another individual.

11a

Confirm

Cancel

11b

Message

1 successfully created  
0 failed Records

12

Users with Errors

- a) Unsuccessful records will be displayed at the bottom of the screen. Field updates on failed records can be made based on the field referenced in the "Error Message" column
- b) Complete the indicated field updates and click the *Reprocess Users* button

*Note: Any Users with errors uncorrected during this process will need to be entered individually in the Single User tab or another Bulk upload. Window to update Users with errors will no longer be available after navigating away from this screen*

HOMEACCOUNTSUSERSADD USERS

Single UserBulk User

Instructions:

Please Download Template [Bulk User Template](#)

Please Save the with .CSV Extension

Choose a User Type by selecting the appropriate checkbox below.

Please use Upload File button to upload users.

Click Create Users button to create users.

Check status column for success or error messages.

Upload Files

Or drop files

Create Users

Portal (AK, CT, WV)☐

Unified Landing Page (MD, DC)☒

Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Type	License State	CDS	DEA	Status
-------	--------------	------------	-----------	-------	-------	------------	-----	----------------------	--------------	---------------	-----	-----	--------

12b

Reprocess Users

Error Message	Title	Organization	First Name	Last Name	PDMP Specialty
Please Provide Valide NPI	Physician	Junior Smoke Test	Yello70	Clouds70	

# User Search

13 Locating a User

Search for Users in any account you manage:

- a) Enter User’s first name, last name or email address in the search bar at the top of any page OR
- b) Search by data in any column in the Users tab: Name, Member Title, Account Name, Email, User Status

Search for Users within the User Audit Page

- c) Enter the User’s first or last name in the search bar

HIE Admin Portal

Search...

SEARCH

HOMEACCOUNTSUSERSADD USERS

Contacts

Recently Viewed

25 items • Sorted by Name

Name

Member Title

Account Name

Email

Phone

User Status

1

☐

Ada1 Gibbler

Cancer Registrar

University of Bacon Baltimor...

ada1@gmail.com

410-111-1234

Active

2

☐

Ada15 Gibbler

Physician

Partlow Medical

ada15@gmail.com

410-111-1248

Deactivated

3

☐

Ada17 Gibbler

Physician

Partlow Medical

ada17@gmail.com

410-111-1250

Suspended

HOMEACCOUNTSASSETSADD USERS

HIE Admin - User Audit Page

Audit Account : Test Account

Approve - Keeps the user(s) Active and updates their Audit Date to today.  
Deny - Deactivates the user(s) and they will no longer be displayed on your audit page.  
No Selection - The user "Status" will remain the same and the Audit Date will not be updated.  
NOTE: All users must be verified once every 90 days to maintain access.

Search

Active User

Suspended User

Active Users

Approve All



# Viewing Account Services

14

View Account Services

- a) Select *Accounts* tab
- b) Click on an Account Name
- c) Select *Services* tab to view a list of services associated with the account available for provisioning to Users

Note: See Glossary for link to services and descriptions

14a

HOMEACCOUNTSUSERSADD USERS

Accounts

All Accounts ▼

10 items • Sorted by Account Name • Filtered by All accounts

	Account Name ↑
1	Alaska Adventure LLC
2	CRISP-MD Internal
3	Deep Space Nine LLC
4	Franklin's House LLC
5	HIE Source Field Test
14b	Next Generation LLC

Account

Next Generation LLC

WebsiteIndustry  
Ambulatory

DETAILSPANELS14cSERVICESACTIVE USERSSUSPENDED USERS

Services	Org Service	Status
HIE Portal	Next Generation LLC - Portal	Active
Clinical Information	Next Generation LLC - InContext	Active
Referrals	Next Generation LLC - ReferralUI	Active
Prescriber Reports	Next Generation LLC - PrescriberReports	Active
COVID-19 Lab Tools	Next Generation LLC - COVIDLabTools	Active
Snapshot	Next Generation LLC - Snapshot	Active
Clinical	Next Generation LLC - Clinical	Active
Unified Landing Page (ULP)	Next Generation LLC - ULP	Active
Encounter Notification System (ENS)	Next Generation LLC - ENS	Active



# Provisioning Services

15

Provisioning a Service to Multiple Users

HIE Administrators can provision a service to multiple users through their associated account. (ex: Upon creation of multiple new users via bulk upload)

- a) Select the Account associated with the Users who need access to a service
- b) Select *Services* tab

HOMEACCOUNTSUSERSADD USERS

Accounts

All Accounts ▾

10 items • Sorted by Account Name • Filtered by All accounts

	Account Name ↑
1	Alaska Adventure LLC
2	CRISP-MD Internal
3	Deep Space Nine LLC
4	Franklin's House LLC
5	HIE Source Field Test
6	Next Generation LLC

Account

Next Generation LLC

Website

Industry

Ambulatory

DETAILSPANELSSERVICESACTIVE USERSSUSPENDED USERS

Account Name

Next Generation LLC

Parent Account

Industry

Ambulatory



# CRISP DC Portal HIE Admin Tool – Provisioning a Service: Multiple Users

## 16 Select Service

- a) Identify service name in the "Service" column
- Note: See Glossary for link to the Services and Descriptions resource
- b) Click on the Org Service blue hyperlink (next to the Service) you would like to provision to Users
- c) Click *Assign Service*

Account

Next Generation LLC

Website

Industry

Ambulatory

DETAILS

PANELS

SERVICES

ACTIVE USERS

SUSPENDED USERS

Services	Org Service	Status
HIE Portal	<a href="#">Next Generation LLC - Portal</a>	Active
Clinical Information	<a href="#">Next Generation LLC - InContext</a>	Active
Referrals	<a href="#">Next Generation LLC - ReferralUI</a>	Active
Prescriber Reports	<a href="#">Next Generation LLC - PrescriberReports</a>	Active
COVID-19 Lab Tools	<a href="#">Next Generation LLC - COVIDLabTools</a>	Active
Snapshot	<a href="#">Next Generation LLC - Snapshot</a>	Active
Clinical	<a href="#">Next Generation LLC - Clinical</a>	Active
Unified Landing Page (ULP)	<a href="#">Next Generation LLC - ULP</a>	Active
Encounter Notification System (ENS)	<a href="#">Next Generation LLC - ENS</a>	Active

Asset

Next Generation LLC - Snapshot

Account

Contact

Product

Status

Install Date

Next Generation LLC

Snapshot

Active

1/11/2022

DETAILS

RELATED

Asset Name

Next Generation LLC - Snapshot

Status

Active

Account

Next Generation LLC

Install Date

1/11/2022

Usage End Date

Deactivation Reason

16a

16b

16c

Assign Service

17 Select Access/Users

Select Access: Select how your Users will access this service

- a) Select HIE Portal
- b) Click *Select Users*
- c) Select the User(s) you are granting access this service by checking the box name to their name
- d) Click *Confirm Selections*

Assign Service

Assign Snapshot Service

Select Access

Select Users

Confirm Selections

Complete!

Select how your users will access this service.\*

HIE Administrators: If your organization has been migrated to the new HIE Portal, please only choose Portal. Otherwise select Unified Landing Page (ULP).

17a

Product Name

1

☒

HIE Portal

2

☐

Unified Landing Page (ULP)

\* required

17b

Select Users

Assign Service

Assign Snapshot Service

✓

Select Users

Confirm Selections

Complete!

Select the User(s) to provide access to this service.\*

Tip:  
1. To select all Users on the current page, click on the box next to "Name".  
2. Do not select more than 100 Users at a time.

Search for Users by Name

	Name	Email	Member Title
1	<input type="checkbox"/> Aalnerer1 chestington1	aalnerer1chestington1...	
2	<input checked="" type="checkbox"/> Aalnerer10 chestingto...	aalnerer10chestington...	
3	<input type="checkbox"/> Aalnerer100 chestingto...	aalnerer100chestington...	
4	<input checked="" type="checkbox"/> Aalnerer101 chestingto...	aalnerer101chestingto...	

<

>

Page 1 of 10.  
Showing 1 to 50 of 488 records.

17d

Confirm Selections

18 Confirm Selections

Confirm Selections:

- a) Review and confirm list of users who should access this service
- b) Click *Complete!*
- c) Success! You have provisioned access of a service to multiple users, Click *Finish*

Assign Service

Assign Snapshot Service

Select Access

✓

Confirm Selections

Complete!

Assign the following Access:

• *HIE Portal*

To the following Users:

18a

	Name	Email	Member Title
1	Aalnerer10 chestington10	aalnerer10chestington1...	
2	Aalnerer11 chestington11	aalnerer11chestington1...	
3	Aalnerer13 chestington13	aalnerer13chestington1...	
4	Aalnerer101 chestington...	aalnerer101chestington...	

< >

18b

Previous

Complete!

Assign Service

Assign Snapshot Service

Select Access

✓

✓

Complete!

Success!

18c

Finish

19

Provisioning a Service to a Single User

HIE Administrators can provision a service to a single User

- a) Access the active User using the search bar at the top of any page or through the *Users* tab
- b) Click on the User's name
- c) Click *Assign Services* in the top right corner

HIE Admin Portal

Search...

SEARCH

HOMEACCOUNTSUSERSADD USERS

Account

Next Generation LLC

Website

Industry

Ambulatory

HOMEACCOUNTSUSERSADD USERS

Contacts

All Contacts

50+ items • Sorted by Account Name • Filtered by All contacts

19b

	Name	Account Name	Member Title
1	Alaskan Salmon	Alaska Adventure LLC	Licensed Clinical Social Worker
2	Alaska PDMP Test	Alaska Adventure LLC	Pharmacist
3	License Test	Alaska Adventure LLC	Dentist
4	Single User	Alaska Adventure LLC	Dentist
5	Edith1 Abbey1	Alaska Adventure LLC	Cancer Registrar

HOMEACCOUNTSUSERSADD USERS

Contact

Alaskan Salmon

+ Follow

Edit

Assign Services

Title

Account Name

Phone

Email

Contact Owner

Audit By

Alaska Adventure LLC

test@alaskhecak.com

Jennifer Jones

Marilyn1 Monroe1

DETAILS

USER SERVICES

Name

Alaskan Salmon

Contact Owner

Jennifer Jones

Account Name

Alaska Adventure LLC

Email

test@alaskhecak.com

20

## Assign Services

- a) Assign Services: Select Service (note: only one service may be selected at a time), Click Next
  - b) Select Access: Select how User will access this service (Choose HIE Portal unless otherwise notified), Click Next
  - c) Click Finish
- \*\*Repeat steps 6a-6c for assigning each service, only one service may be provisioned at a time*

Note: See Glossary for link to services and descriptions.

Assign Services

Select the appropriate service available to Alaskan listed below in order to grant access. (Note: only one service may be selected at a time).

Select ONE Service below:

Snapshot  
Snapshot

Encounter Notification System (ENS)  
ENS

20a

Next

Assign Services

Select how Alaskan Salmon will access Snapshot. HIE Administrators: Choose HIE Portal unless otherwise notified.

Select Access

HIE Portal  
Portal

20b

Previous

Next

Assign Services

20c

Finish

# Password Reset

User HIE Portal password can be reset in the HIE Admin Tool

## 21 User Password Reset

- a) Search for User
- b) Click on User's name
- c) Click on *User Services* tab
- d) Click View All to expand view

HIE Admin Portal

plum

SEARCH

HOMEACCOUNTSUSERSADD USERS

Search Results

All

Contacts

Accounts

Cases

Collapse List

Contacts

5+ Results • Sorted by Relevance

NAME	MEMBER TITLE	ACCOUNT NAME	EMAIL	PHO
Plum10 Fruit10	Scribe	Next Generation LLC	plum10fruit10@lkadjflakjf.com	
Plum9 Fruit9	Scribe	Next Generation LLC	plum9fruit9@lkadjflakjf.com	
Plum8 Fruit8	Scribe	Next Generation LLC	plum8fruit8@lkadjflakjf.com	
Plum7 Fruit7	Scribe	Next Generation LLC	plum7fruit7@lkadjflakjf.com	
Plum6 Fruit6	Scribe	Next Generation LLC	plum6fruit6@lkadjflakjf.com	

Contact

Plum10 Fruit10

+ Follow

Edit

Assign Services

Title

Account Name

Phone

Email

Contact Owner

Audit By

Next Generation LLC

plum10fruit10@lkadjflakjf.com

Jennifer Jones

Marilyn1 Monroe1

21c

USER SERVICES

Assets (3)

Asset Name	Product Code	Status	Primary Role
Plum10 Fruit10 - Next Generation LLC - ...	ConsentTool	Active	
Plum10 Fruit10 - Next Generation LLC - ...	Portal	Active	
Plum10 Fruit10 - Next Generation LLC - ...	Portal	Active	

21d

View All

22 User Password Reset

Click on the blue hyperlink name in the *User* column associated with **Portal** only:  
<username><account name>Portal

DETAILS USER SERVICES

User Services (8)					<div><div></div><div></div><div></div></div>	
User	User Service	Status	Primary Role	Account Name		
1 Plum10 Fruit10 - Next Generation LLC - ConsentTool	ConsentTool	Active		Next Generation LLC		
2 Plum10 Fruit10 - Next Generation LLC - ConsentTool - Portal	Portal	Active		Next Generation LLC		
3 Plum10 Fruit10 - Next Generation LLC - Portal	Portal	Active		Next Generation LLC		



23

## User Password Reset

- a)
- Click on *HIE Portal User Management*
- b)
- Read the instructions then click on *Confirm Reset*

Asset

Plum10 Fruit10 - Next Generation LLC - Portal

Account

[Next Generation LLC](#)

Contact

[Plum10 Fruit10](#)

Product

[HIE Portal](#)

Status

Active

Install Date

6/22/2022

DETAILS

RELATED

Asset Name

Plum10 Fruit10 - Next Generation LLC - Portal

Account

[Next Generation LLC](#)

Product

[HIE Portal](#)

Status

Active

Contact

[Plum10 Fruit10](#)

Username

plum10fruit10@lkadjflakjf.com

23a

HIE Portal User Management

HIE Portal User Management

- By clicking "Confirm Reset", the user will receive an email with instructions on how to reset their HIE Portal password. Please instruct users to read the email carefully, as it specifies password requirements.
- Allow 15 minutes for the Password Reset email to arrive in the user's inbox. If the user does not see the Password Reset email after this time frame, please ensure that Junk/Spam folders are checked prior to resending another Password Reset email.
- If you or the user are experiencing issues, please contact the HIE Technical User Support team to troubleshoot.

23b

Confirm Reset

Cancel

The background of the slide features a series of concentric circles in various shades of blue and light blue, creating a ripple effect that fills the entire frame.

# Editing User Details

24

Choosing an Account

- a) Choose the Account you would like to view by clicking on the Account Name
- b) Select *ACTIVE USERS* or *SUSPENDED USERS* tab to view users listed with the Account

HOMEACCOUNTSUSERSADD USERS

Accounts

Recently Viewed

2 items • Updated a few seconds ago

Search this list...

	Account Name	Industry	Billing City	Billing State/Province (text o...
1	Jones Practice LLC	Ambulatory		
2	Partlow Medical	Ambulatory		

HOMEACCOUNTSUSERSADD USERS

Account

Jones Practice LLC

+ Follow

New Note

Audit

Phone

Website

Industry

Ambulatory

DETAILSPANELSSERVICESACTIVE USERSSUSPENDED USERS

25

# Viewing and Selecting a Contact

- a) Choose the Contact (User) you would like to view by clicking on the Contact Name
- b) Select *View All* if your contact is not on the initial list

HOMEACCOUNTSUSERSADD USERS

Account Test Account

+ FollowNew NoteAudit

PhoneWebsiteTypeIndustryHospitalAccount OwnerAvideon CRISP

DETAILSPANELSSERVICESACTIVE USERSSUSPENDED USERS

Active Users

Related Contacts (6+)

New ContactAdd Relationship

Contact Name	User Status	Roles	Email
test Account	Active		test@accout.com
test accountone	Active		test@accone.com
John W Adam Jr	Active		test100@test.com
Amber Adams	Active		a.adams@randatmail.com
Lilliana Alexander	Active		lalexander@randatmail.com
Stella Alexander	Active		s.alexander@randatmail.com

View All

26

Editing and Saving a Contact

- a) Select *Edit* to update the contact’s information
- b) Select *Save* to confirm the updated information

HOMEACCOUNTSUSERSADD USERS

Contact

Ronald Test

+ Follow

Edit

Assign Services

Title

Account Name

Phone (2) ▼

Email

Contact Owner

Jones Practice LLC

Avideon CRISP

DETAILS

RELATED

Name

Ronald Test

Contact Owner

Avideon CRISP

Account Name

Jones Practice LLC

Contact Type

Edit Contact

\* Name

Salutation

--None--

First Name

Ronald

Middle Name

\* Last Name

Test

Suffix

Account Name

Jones Practice LLC

Reports To

Search Contacts...

Member Title

Contact Owner

Avideon CRISP

Contact Type

--None--

Email

Phone

Cancel

Save

# Glossary

# HIE Admin User Guide – Glossary

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**Health Information Exchange (HIE):** An integrated network connecting Hospitals, Primary Care Practices, and Public Health Entities. HIE provides users with access to patients' medical records at the point of care and analytics to improve public health. HIE networks allow appropriate access by securely sharing patient medical information across organizations.

**HIE Administrator:** An authorized, organizational representative who can credential and remove Contacts from their organization.

**Account:** Legal physical entity. Some HIE Administrators have access to multiple Accounts within their larger organization.

**Audit:** The process of verifying, denying, and adding Users.

**Contact or User:** A User who has been created to access HIE Services.

**Active User:** A User who has access to HIE Tools, for example ULP.

**Suspended User:** A User whose access to HIE Tools has lapsed due to inactivity, inappropriate use, or a change of employment.

**Description of Services:** A full list of services with descriptions available to HIE Administrators is located [<here>](#)

**Prescription Monitoring Program:** Access to this service can be obtained by calling HIE Technical User Support Team at the number located at the beginning of this guide.