



DC PORTAL - HIE ADMIN TOOL

User Guide

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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

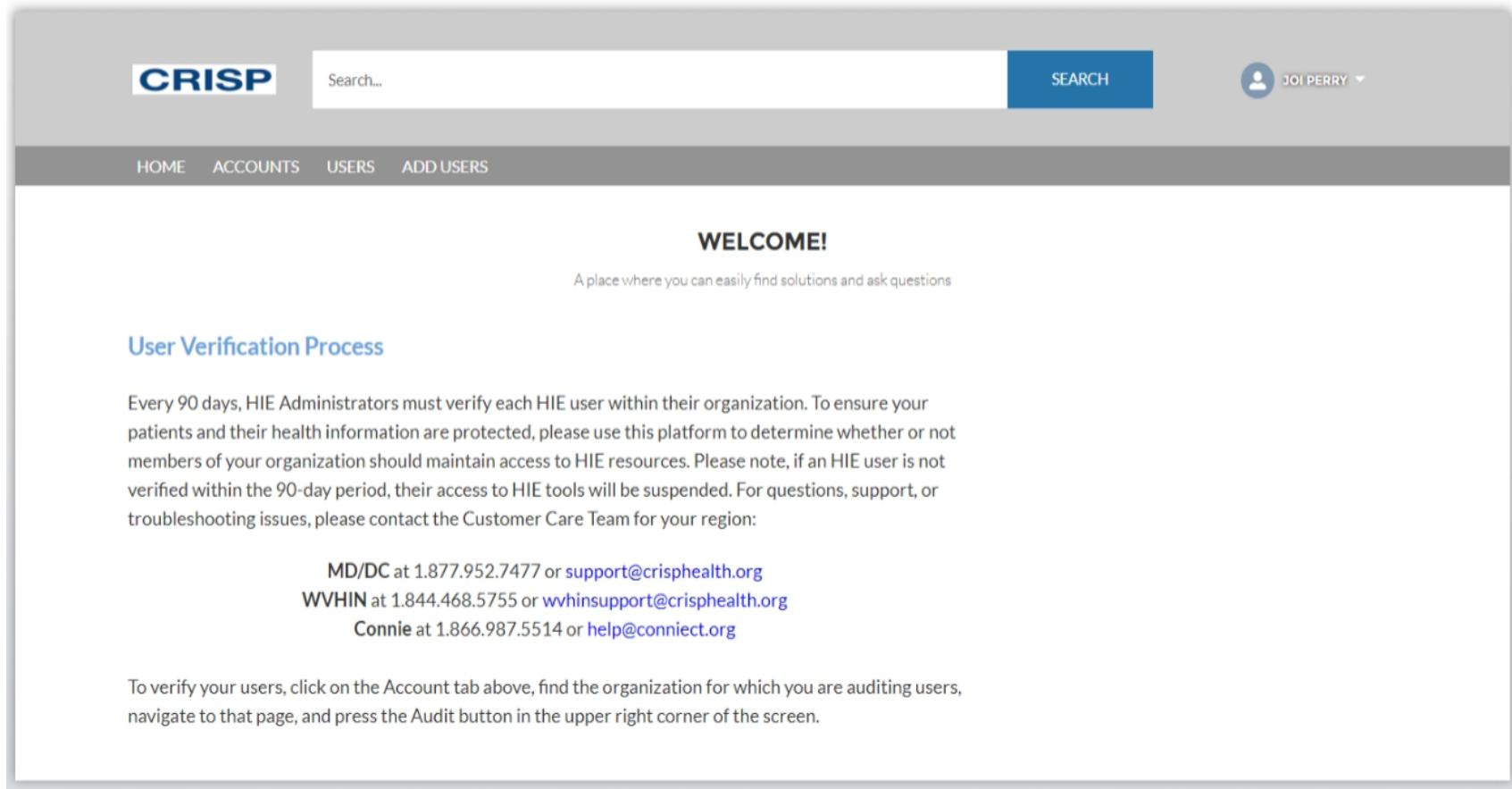


- **HIE Admins are responsible for adding new users to their account(s), assigning HIE services to their user(s), and auditing each user every 90 days.**

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 shows the CRISP HIE Admin Tool interface. At the top, there is a header with the CRISP logo, a search bar, a 'SEARCH' button, and a user profile for 'JOI PERRY'. Below the header is a navigation bar with links for 'HOME', 'ACCOUNTS', 'USERS', and 'ADD USERS'. The main content area features a 'WELCOME!' message and a sub-section titled 'User Verification Process'. The 'User Verification Process' section contains text about the 90-day verification requirement and contact information for support. At the bottom, there is a note about verifying users via the 'ACCOUNTS' tab.

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

WVHIN at 1.844.468.5755 or wvhinsupport@crisphealth.org

Connie at 1.866.987.5514 or help@conniect.org

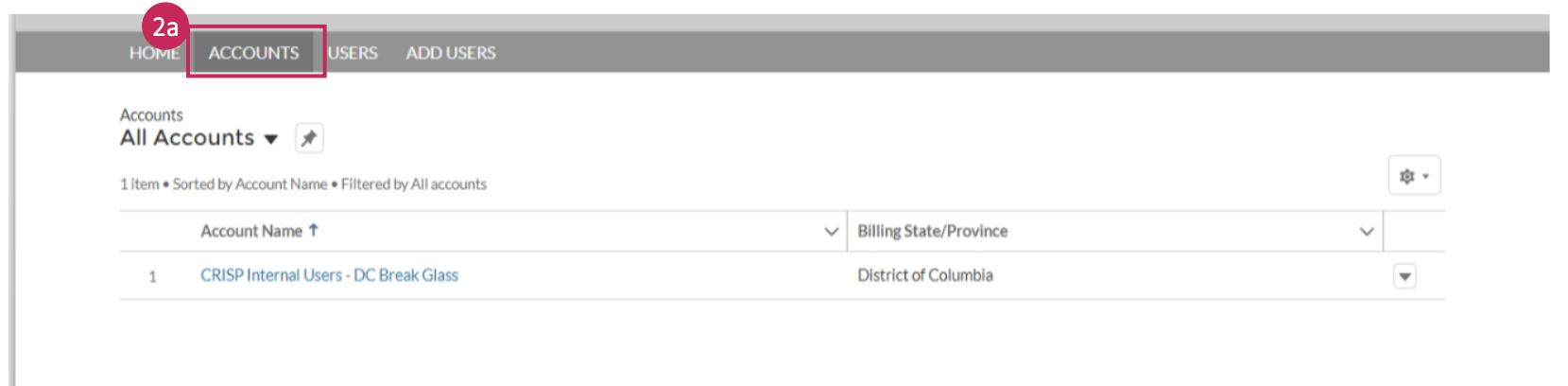
To verify your users, click on the Account tab above, find the organization for which you are auditing users, navigate to that page, and press the Audit button in the upper right corner of the screen.

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.



2a

HOME ACCOUNTS USERS ADD USERS

Accounts
All Accounts ▾ 

1 item • Sorted by Account Name • Filtered by All accounts

Account Name ↑	Billing State/Province
1 CRISP Internal Users - DC Break Glass	District of Columbia



2b

HOME ACCOUNTS USERS ADD USERS

Account
CRISP Internal Users - DC Break Glass

+ Follow 

Phone	Website	Industry
		Ambulatory

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

3b

Suspended Users								Approve All
Status	Name	Email	Member Title	Department	Audit Date	Audit By		
Approve Deny	Laughter Ajibade	laughter@test.com	Nurse Practitioner		2021-03-16	2021-03-16		
Approve Deny	Peter Shay	shay@test.com	Physician, Intern		2021-03-17	2021-03-17		
Approve Deny	Test Thu1	testthu1@test.com	Dentist		2021-03-17	2021-03-17		
Approve Deny	Nick Redfurn	nick@test.com			2021-03-18	2021-03-18		
Approve Deny	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, 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](#)

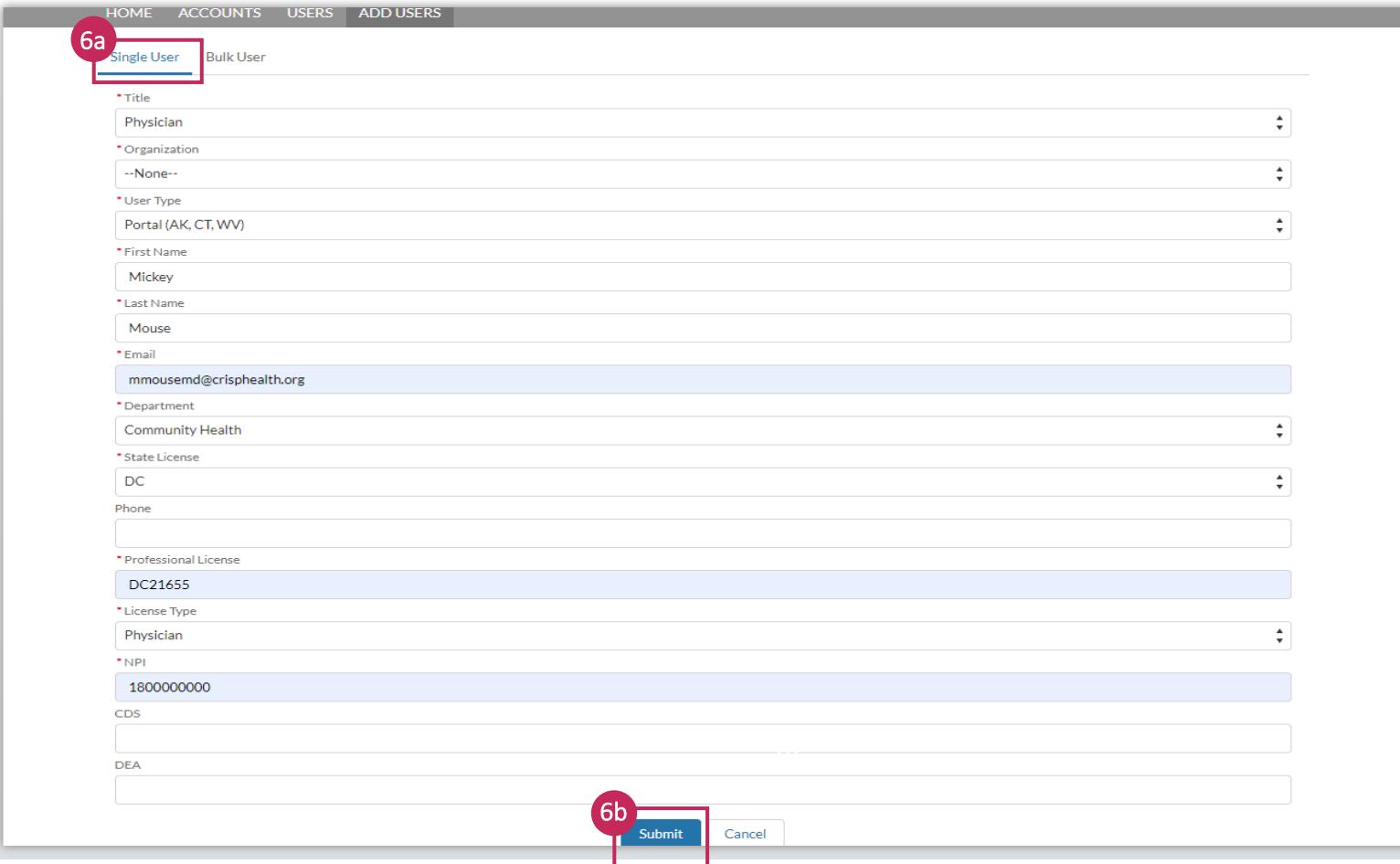
✓ Success
All records Successfully Updated ✗

Adding New Users

Adding New Users - Individual

6

- 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.



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

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.



SEARCH


JOI PERRY ▾

HOME
ACCOUNTS
USERS
ADD USERS

7a
Single User
Bulk 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.

Create Users
7b

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
-------	--------------	------------	-----------	-------	-------	------------	-----	----------------------	--------------	---------------	-----	-----	--------

A screenshot of Microsoft Excel showing a table with 11 columns and 5 rows. The columns are labeled: Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License Type, License Status, and DEA. Row 3 is highlighted with a green background. The table is located on a worksheet with a green header bar containing the Excel logo, the title 'hieportal.force.com - View-only', and a search bar. The ribbon menu is visible at the top, showing 'Home' is selected. The status bar at the bottom shows the cell reference 'K3'.

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 User Bulk User Unprocessed Users

* Title
Other Licensed Healthcare Practitioner

* Organization
--None--

* User Type
--None--

* First Name

* Last Name

* Email

* Department
--None--

State License
--None--

Phone

8a 8a Submit Cancel

Confirm

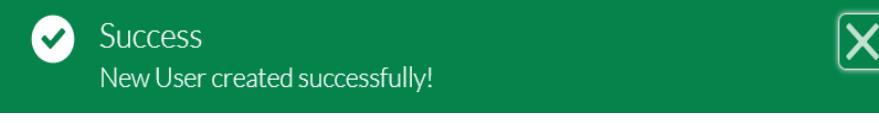
* As a designated HIE Administrator or Point of Contact, on behalf of the above organization, I attest the Authorized User is a member of the organization's workforce and their identity has been verified in accordance with requirements outlined in the HIE policies and procedures as applicable.

* 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

Confirm Cancel

8c



New User Creation Error

9

- 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

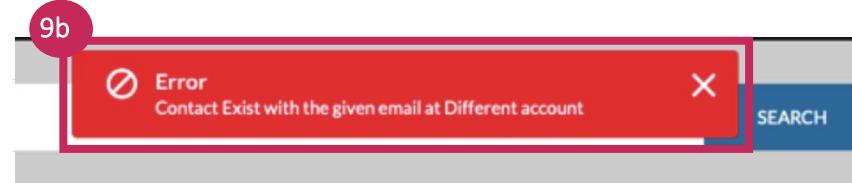
Confirm

* 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 log-in 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.

5s

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 log-in credentials with another individual.

11a

Confirm

Cancel

11b

Message

1 successfully created
0 failed Records

Users with Errors

12

- 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
- 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

HOME ACCOUNTS USERS ADD USERS

Single User Bulk 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.

Create Users Portal (AK, CT, WV) Unified Landing Page (MD, DC)

12b **Reprocess Users**

12a **Error Message**

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

Please Provide Valid NPI

Physician Junior Smoke Test Yello70 Clouds70

User Search

13

Locating a User

Search for Users in any account you manage:

- Enter User's first name, last name or email address in the search bar at the top of any page *OR*
- 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

- Enter the User's first or last name in the search bar

The screenshot illustrates three methods for locating users in the HIE Admin Portal:

- 13a:** The search bar at the top of the page, labeled with a red circle and the number 13a. It contains the placeholder text "Search..." and a blue "SEARCH" button.
- 13b:** The search bar within the "Users" table, labeled with a red circle and the number 13b. It is located at the top of the table and contains the placeholder text "Search this list...".
- 13c:** The search bar on the "HIE Admin - User Audit Page", labeled with a red circle and the number 13c. It is located at the top of the audit page and contains the placeholder text "Search".

Users Table Data:

	<input type="checkbox"/> Name ↑	Member Title	Account Name	Email	Phone	User Status	
1	<input type="checkbox"/> Ada1 Gibbler	Cancer Registrar	University of Bacon Baltimor...	ada1@gmail.com	410-111-1234	Active	<input type="button" value=""/>
2	<input type="checkbox"/> Ada15 Gibbler	Physician	Partlow Medical	ada15@gmail.com	410-111-1248	Deactivated	<input type="button" value=""/>
3	<input type="checkbox"/> Ada17 Gibbler	Physician	Partlow Medical	ada17@gmail.com	410-111-1250	Suspended	<input type="button" value=""/>

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.)

Active User Suspended User

Active Users

Viewing Account Services

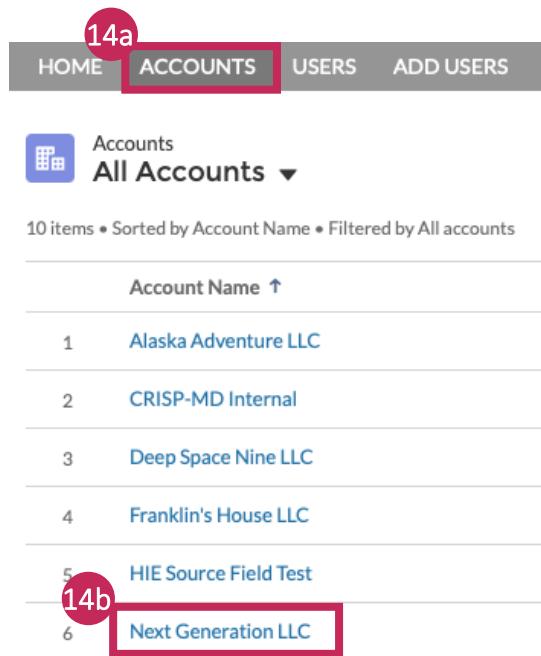
14

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



HOME ACCOUNTS USERS ADD USERS

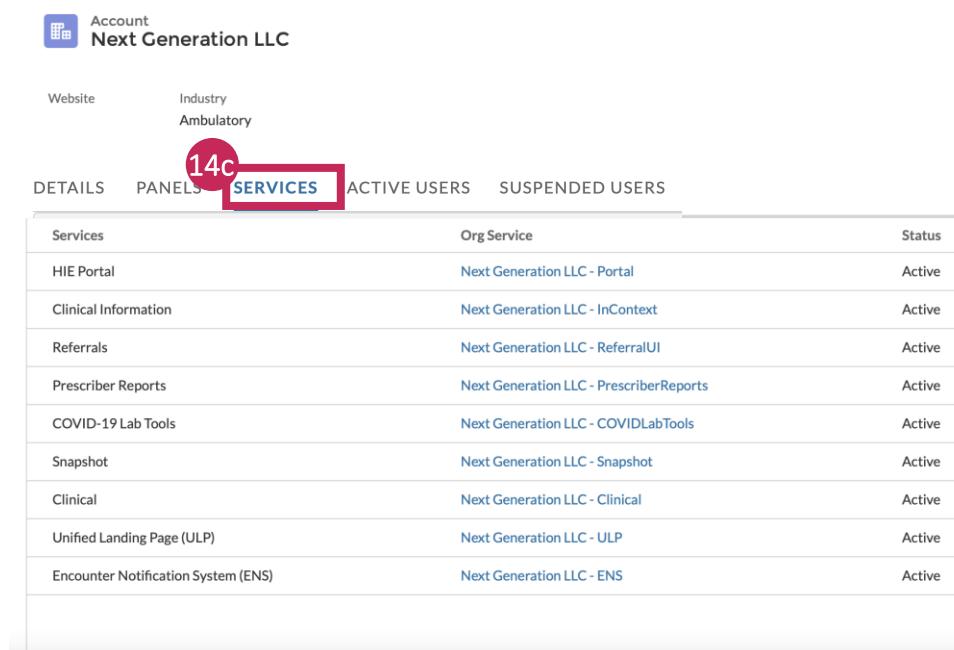
Accounts

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
6	

14c



Account
Next Generation LLC

Website Industry
Ambulatory

DETAILS	PANELS	14c SERVICES	ACTIVE USERS	SUSPENDED 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

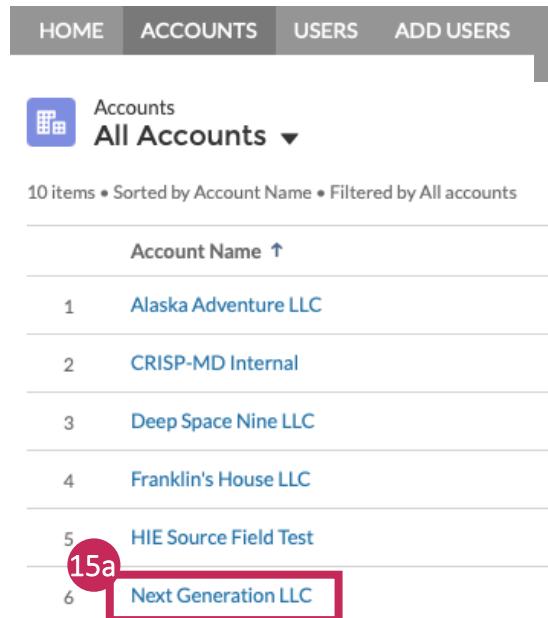
Provisioning Services

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



HOME ACCOUNTS USERS ADD 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

DETAILS PANELS **SERVICES** ACTIVE USERS SUSPENDED USERS

Account Name
Next Generation LLC
Parent Account
Industry
Ambulatory

16

Select Service

- Identify service name in the "Service" column

Note: See Glossary for link to the Services and Descriptions resource

- Click on the Org Service blue hyperlink (next to the Service) you would like to provision to Users
- Click *Assign Service*

Account
Next Generation LLC

Website Industry
Ambulatory

DETAILS	PANELS	SERVICES	ACTIVE USERS	SUSPENDED 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
16a		Snapshot	Next Generation LLC - Snapshot	Active
	16b	Clinical	Next Generation LLC - Clinical	Active
		Unified Landing Page (ULP)	Next Generation LLC - ULP	Active
		Encounter Notification System (ENS)	Next Generation LLC - ENS	Active

Asset
Next Generation LLC - Snapshot

Account	Contact	Product	Status	Install Date
Next Generation LLC		Snapshot	Active	1/11/2022

DETAILS RELATED

Asset Name	Status
Next Generation LLC - Snapshot	Active
Account	Install Date
Next Generation LLC	1/11/2022

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!**

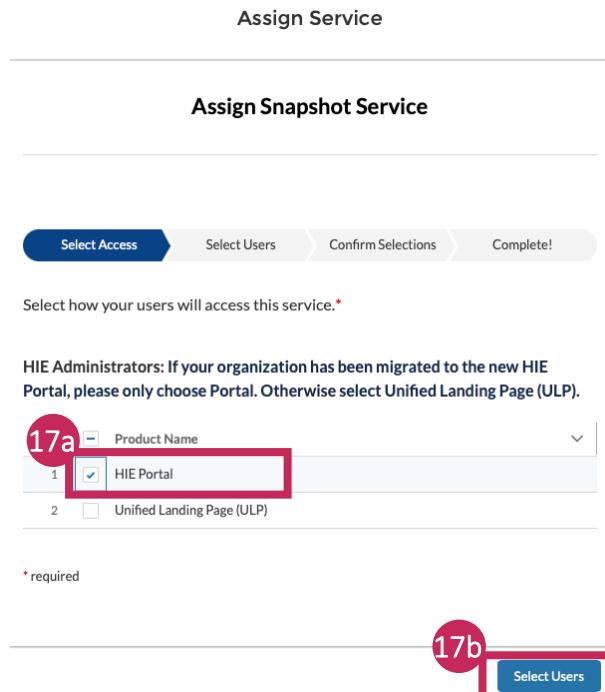
Select how your users will access this service.*

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!**

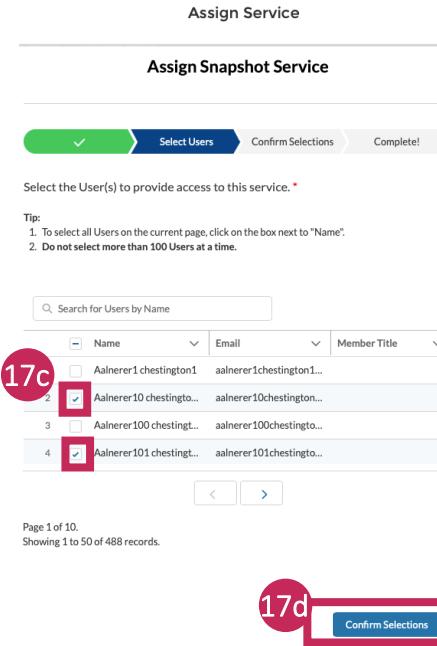
Select the User(s) to provide access to this service. *

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.

	Name	Email	Member Title
1	<input type="checkbox"/> Aalnerer1 chestington1	aalnerer1chestington1...	
2	<input checked="" type="checkbox"/> Aalnerer10 chestingto...	aalnerer10chestingto...	
3	<input type="checkbox"/> Aalnerer100 chestingto...	aalnerer100chestingto...	
4	<input checked="" type="checkbox"/> Aalnerer101 chestingto...	aalnerer101chestingto...	

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

17c **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

18a

Select Access ✓ Confirm Selections Complete!

Assign the following Access:

• **HIE Portal**

To the following Users:

18b

Search for Users by Name

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

18c

Previous Complete!

Assign Service

Assign Snapshot Service

18c

Select Access ✓ ✓ Complete!

Success!

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

19a

19b

	Name	Account Name	Member Title
1	<input type="checkbox"/> Alaskan Salmon	Alaska Adventure LLC	Licensed Clinical Social Worker
2	<input type="checkbox"/> Alaska PDMP Test	Alaska Adventure LLC	Pharmacist
3	<input type="checkbox"/> License Test	Alaska Adventure LLC	Dentist
4	<input type="checkbox"/> Single User	Alaska Adventure LLC	Dentist
5	<input type="checkbox"/> Edith1 Abbey1	Alaska Adventure LLC	Cancer Registrar

19c

Contact Alaskan Salmon

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
Account Name	Alaska Adventure LLC
Contact Owner	Jennifer Jones
Email	test@alaskhecak.com

20

Assign Services

- Assign Services: Select Service (*note: only one service may be selected at a time*), Click *Next*
- Select Access: Select how User will access this service (Choose HIE Portal unless otherwise notified), Click *Next*
- 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.

The image displays three sequential screenshots of the 'Assign Services' interface:

- Screenshot 20a:** The 'Assign Services' screen. A callout box says: "Select the appropriate service available to Alaskan listed below in order to grant access. (Note: only one service may be selected at a time)." Below is a list of services:
 - Snapshot** (selected, checked)
 - Encounter Notification System (ENS)** (ENS)At the bottom are 'Previous' and 'Next' buttons. A red circle with '20a' is on the 'Next' button.
- Screenshot 20b:** The 'Assign Services' screen. A callout box says: "Select how Alaskan Salmon will access Snapshot. HIE Administrators: Choose HIE Portal unless otherwise notified." Below is a list of access methods:
 - HIE Portal** (selected, checked)At the bottom are 'Previous' and 'Next' buttons. A red circle with '20b' is on the 'Next' button.
- Screenshot 20c:** The 'Assign Services' screen for Jennifer Jones. It shows the assigned services and access method:
 - Service: Snapshot
 - Access: HIE PortalAt the bottom is a 'Finish' button. A red circle with '20c' is on the 'Finish' button.

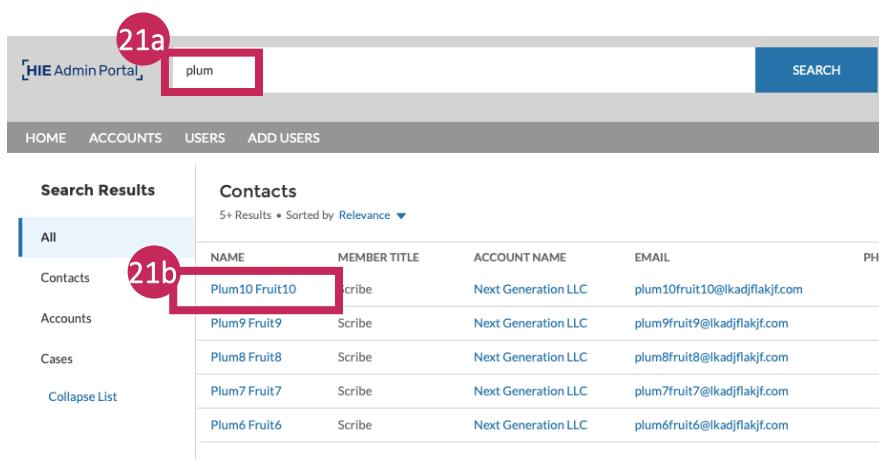
Password Reset

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

21 User Password Reset

- Search for User
- Click on User's name
- Click on *User Services* tab
- Click View All to expand view

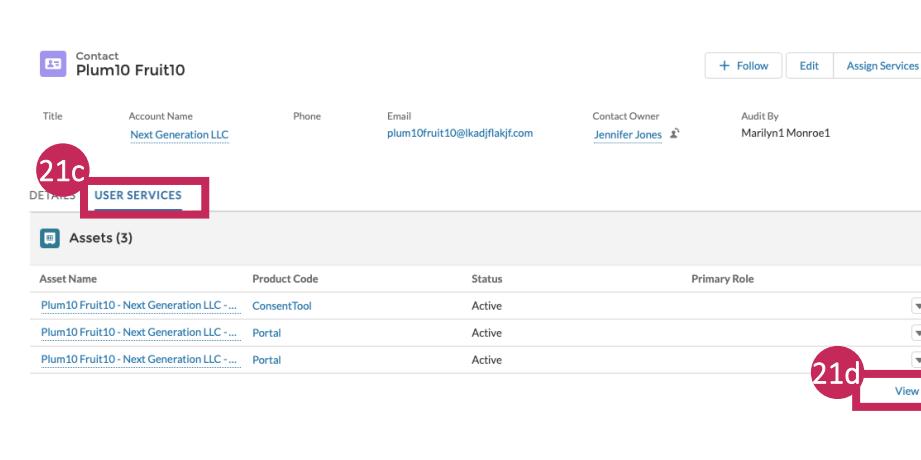
21a



21b

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

21c



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

User Services (8)		User Service	Status	Primary Role	Account Name	
1	Plum10 Fruit10 - Next Generation LLC - ConsentTool	ConsentTool	Active		Next Generation LLC	<input type="button" value="▼"/>
2	Plum10 Fruit10 - Next Generation LLC - ConsentTool - Portal	Portal	Active		Next Generation LLC	<input type="button" value="▼"/>
3	Plum10 Fruit10 - Next Generation LLC - Portal	Portal	Active		Next Generation LLC	<input type="button" value="▼"/>

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	Contact	Product	Status	Install Date
Next Generation LLC	Plum10 Fruit10	HIE Portal	Active	6/22/2022

DETAILS	RELATED
Asset Name Plum10 Fruit10 - Next Generation LLC - Portal	Status Active
Account Next Generation LLC	Contact Plum10 Fruit10
Product HIE Portal	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.

Press Confirm Button to Reset Password.

23b

[Confirm Reset](#)

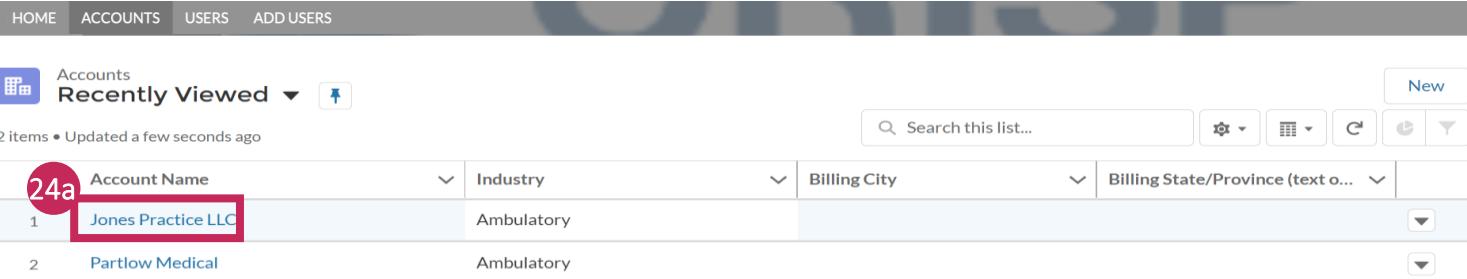
[Cancel](#)

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



HOME ACCOUNTS USERS ADD USERS

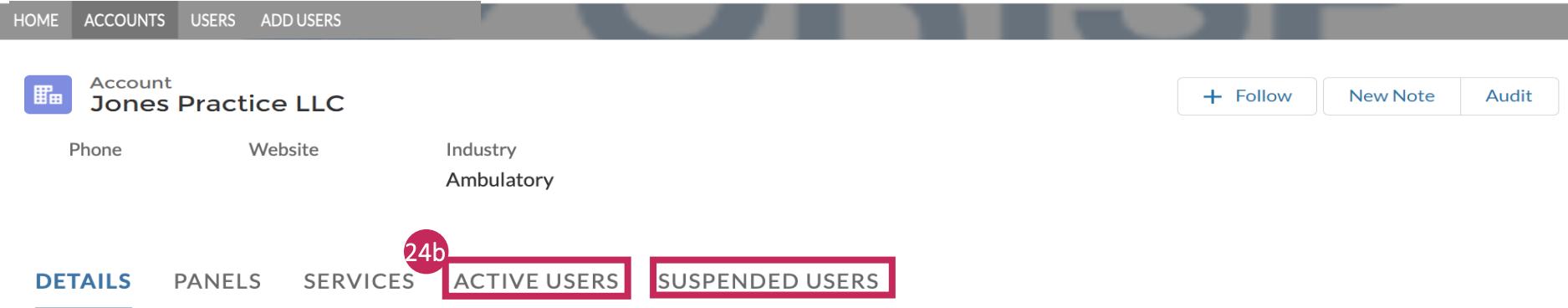
Accounts Recently Viewed

24a

Account Name	Industry	Billing City	Billing State/Province
Jones Practice LLC	Ambulatory		
Partlow Medical	Ambulatory		

2 items • Updated a few seconds ago

Search this list... More Print CSV PDF Excel



HOME ACCOUNTS USERS ADD USERS

Account Jones Practice LLC

24b

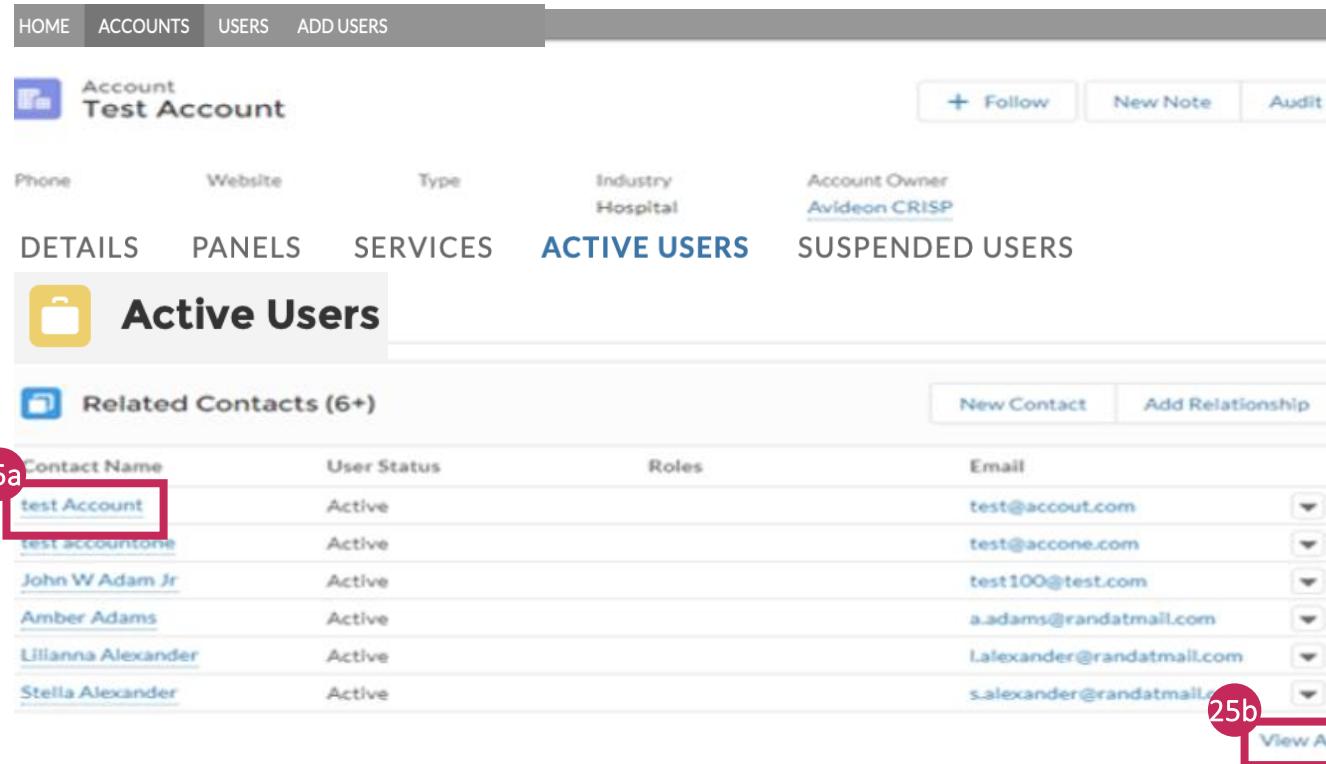
Phone	Website	Industry
		Ambulatory

DETAILS PANELS SERVICES ACTIVE USERS SUSPENDED 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



HOME ACCOUNTS USERS ADD USERS

Account Test Account

Follow New Note Audit

Phone	Website	Type	Industry	Account Owner
			Hospital	Avideon CRISP

DETAILS PANELS SERVICES ACTIVE USERS SUSPENDED USERS

Active Users

Related Contacts (6+)

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
Lilianna Alexander	Active		l.alexander@randatmail.com
Stella Alexander	Active		s.alexander@randatmail.com

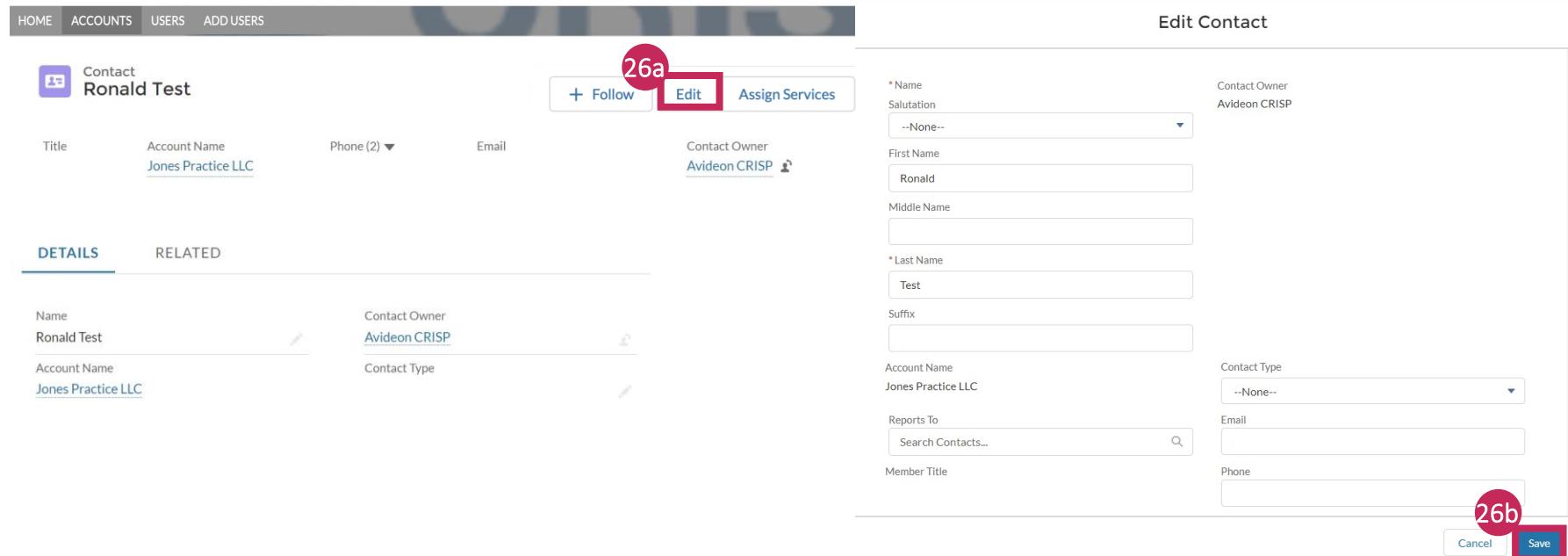
New Contact Add Relationship

View All

26

Editing and Saving a Contact

- Select *Edit* to update the contact's information
- Select *Save* to confirm the updated information



The screenshot shows the 'Edit Contact' interface in the CRISP DC Portal HIE Admin Tool. On the left, there is a summary card for 'Ronald Test' with fields for Title, Account Name (Jones Practice LLC), Phone (2), Email, and Contact Owner (Avideon CRISP). Below this are 'DETAILS' and 'RELATED' tabs. On the right, the 'Edit Contact' form is displayed with various input fields: Name (Salutation dropdown, First Name: Ronald, Middle Name, Last Name: Test, Suffix), Account Name (Jones Practice LLC), Contact Type (dropdown, Reports To: Search Contacts...), and Email/Phone fields. At the bottom are 'Cancel' and 'Save' buttons. A red circle with the number '26a' is over the 'Edit' button, and another red circle with '26b' is over the 'Save' button.

Glossary

HIE Admin User Guide – Glossary

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.