

# HIE Admin Tool User Guide



## Getting Started!

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

This guide provides step-by-step information on the basic functions of the HIE Admin Tool.

## HIE Technical User Support Team

### CRISP MD:

P: 877.952.7477

E: support@crisphealth.org

### CRISP DC:

P: 833.580.4646

E: support@crisphealth.org

### WVHIN:

P: 844.468.5755

E: wvhinsupport@crisphealth.org

### Connie:

P: 866.987.5514

E: help@connect.org

### healtheConnect Alaska:

P: 907-770-2626

E: help@ak-ehealth.org

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# Accessing the Tool

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# HIE Admin User Guide – Accessing the Tool

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:

**MD ULP users** – Log on to <https://hieportal.force.com/hieadmin> to access the HIE Admin Tool

**MD HIE Portal users** – Log on to: <https://portal.crisphealth.org> → “HIE Admin Tool”

**DC ULP users** – Log on to: <https://hieportal.force.com/hieadmin> to access the HIE Admin Tool

**DC HIE Portal users** – Log on to: <https://portal.crispdc.org> → “HIE Admin Tool”

**WV users** – Log on to: <https://portal.wvhin.org> → “HIE Admin Tool”

**CT users** – Log on to: Connie Portal <https://portal.connect.org> → “HIE Admin Tool”

**AK users** – Log on to: healtheHUB Portal <https://hub.healtheconnectak.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



### User Verification Process

# Tool Overview

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## 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.**

# Managing Existing Users

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**Every 90 days, HIE Administrators must verify each HIE user within their organization.**

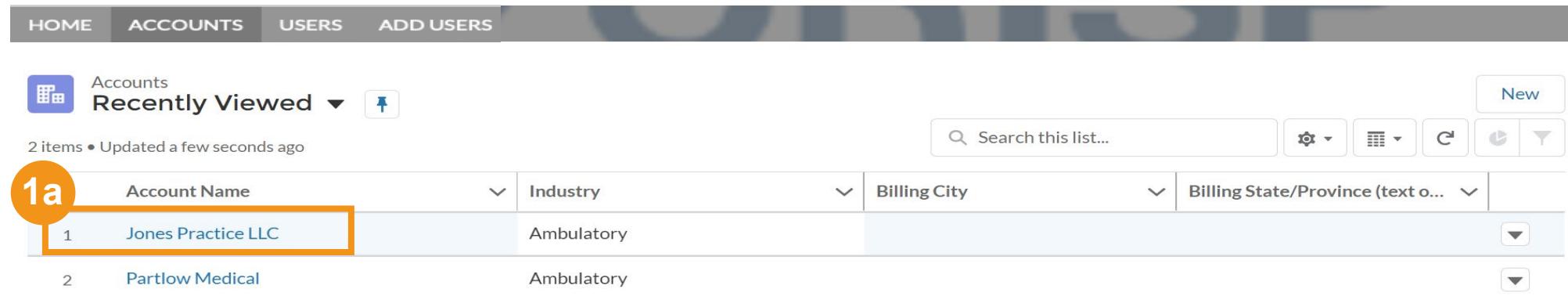
To ensure your patients and their health information are protected, please use this platform to determine whether or not members of your organization should maintain access to HIE resources. Please note, if an HIE user is not verified within the 90-day period, their access to HIE tools will be suspended.

# HIE Admin User Guide – Managing Existing Users

1

## Choosing an Account

(1a) In the Accounts tab, choose the Account you would like to audit by clicking on the Account Name  
(1b) Select Audit in the top-right of your screen



HOME ACCOUNTS USERS ADD USERS

Accounts Recently Viewed ▾

2 items • Updated a few seconds ago

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

New

Search this list... ▾

1a

1b



HOME ACCOUNTS USERS ADD USERS

Account Jones Practice LLC

+ Follow New Note Audit

Phone	Website	Type	Industry	Account Owner
			Ambulatory	Outreach Team

1b

# HIE Admin User Guide – Managing Existing Users

2

## Managing Active Users

- (2a) To work with Active Users, ensure the *Active User* tab is selected
- (2b) Select *Approve* to continue a user's access to tools for existing staff. If all users should be approved, you can select *Approve Current Page* on the right side of the screen
- (2c) Select *Deny* to revoke access for individuals who are no longer employees within your organization
- (2d) Select *Complete Audit*, confirm selections on User Confirmation Page then select "*Finish*"

### Audit Account : Jones Practice LLC

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.

2a

2b

2c

2d

Active Users							Approve Current Page
Status	Name	Email	Member Title	Department	Audit Date	Audit By	
<b>2b</b> Approve	HIE AdminEmail	mpartlow@avideon.com					
<b>2c</b> Approve	Juan Gonzalez						

Complete Audit

Cancel

9

# HIE Admin User Guide – Managing Existing Users

3

## Managing Suspended Users

3a

Active User	<a href="#">Suspended User</a>
-------------	--------------------------------

(3a) To work with suspended users, ensure the *Suspended User* tab is selected  
(3b) If *Suspended Users* are present, select the appropriate indicator to *Approve* or *Deny* the user. If *Denied*, the user account will be revoked  
(3c) 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.**

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

3c

[Complete Audit](#) [Cancel](#)

# HIE Admin User Guide – Managing Existing Users

4

## Confirming an Audit

(4a) Upon clicking *Finish*, you will see the *Success* prompt

(4b) 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 **Finish**

4b



Success

All records Successfully Updated



4a

# Creating Individual Users

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# HIE Admin User Guide – Adding Individual Users

1

## Selecting a Title

1a

(1a) To provide access to HIE tools, click the *Add Users* tab at the top of the home screen

Note: Follow this same process to reactivate a User that is currently deactivated. Access to services for these Users must be provisioned again, see Provisioning Services section for detailed instructions.

The screenshot shows the 'Add Users' tab selected in the top navigation bar. Below it, there are three tabs: 'Single User' (selected), 'Bulk User', and 'Unprocessed Users'. A dropdown menu for 'Title' is open, showing a list of options. The first option, '-None-', is selected. The dropdown has up and down arrows on the right side. At the bottom of the dropdown are 'Submit' and 'Cancel' buttons. Below the dropdown, a list of titles is displayed, each preceded by a radio button. The list includes: Other Non-Licensed Staff, Cancer Registrar, Certified Nurse Midwife, Clinical Pharmacist, Dentist, Licensed Clinical Social Worker, LTC Consultant Pharmacist, Medical Assistant, Nurse Practitioner, Nursing Home Administrator, Nursing Home Other Staff, Other Licensed Healthcare Practitioner, and Other Non-Licensed Staff. The entire list is highlighted with a large orange rectangle.

1b

Single User Bulk User Unprocessed Users

\* Title

-None-

Submit Cancel

Title

Other Non-Licensed Staff

Cancer Registrar  
Certified Nurse Midwife  
Clinical Pharmacist  
Dentist  
Licensed Clinical Social Worker  
LTC Consultant Pharmacist  
Medical Assistant  
Nurse Practitioner  
Nursing Home Administrator  
Nursing Home Other Staff  
Other Licensed Healthcare Practitioner  
Other Non-Licensed Staff

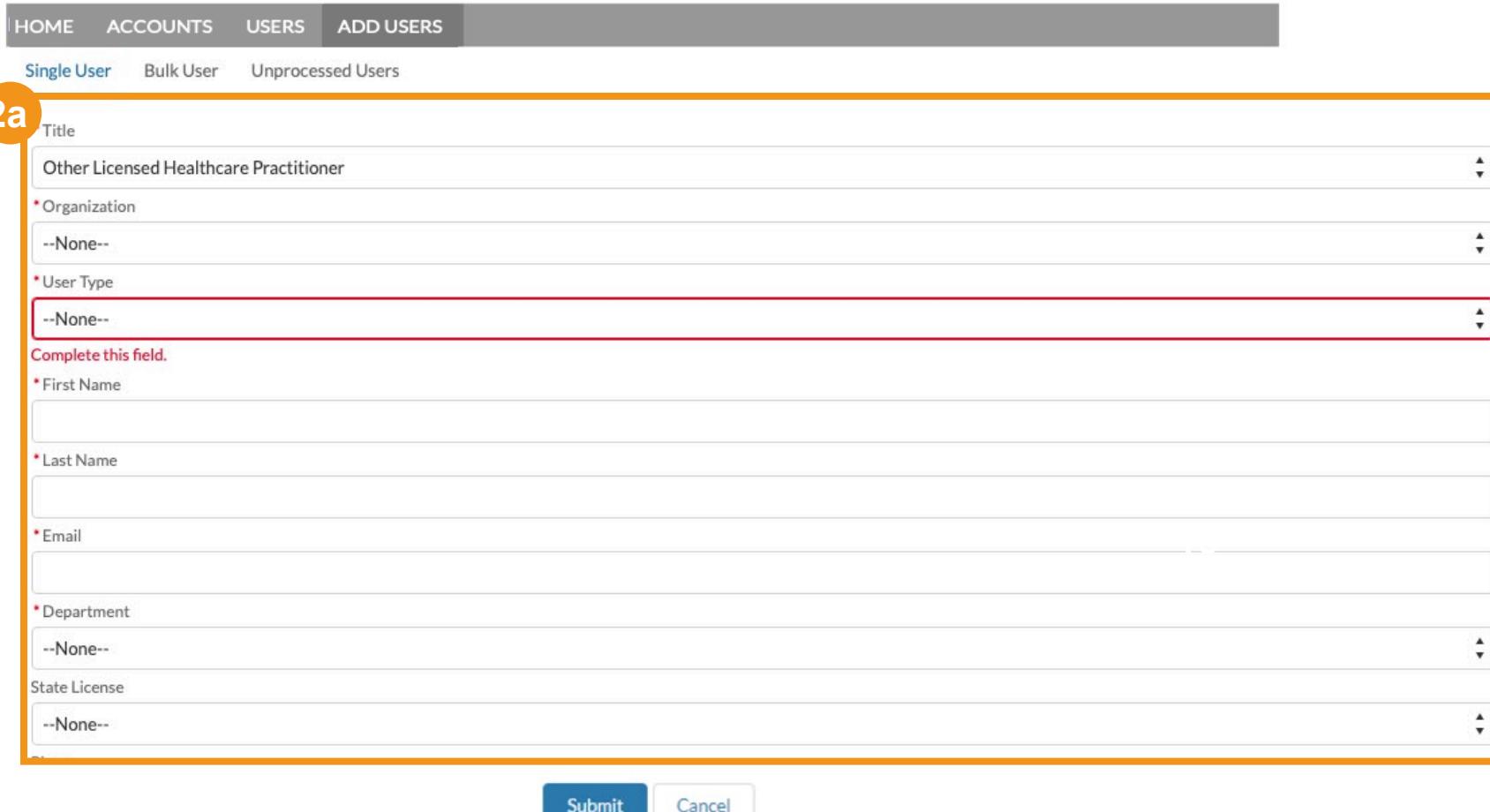
# HIE Admin User Guide – Adding Individual Users

2

## Creating a New User

(2a) Complete the following fields. Keep in mind that all fields marked with asterisks \* are required

*NOTE: \*User Type – select “Portal” if you are an HIE Admin in CT, WV or AK; select Unified Landing Page if you are an HIE Admin in MD or DC*



The screenshot shows a user interface for adding a new user. At the top, there is a navigation bar with links for HOME, ACCOUNTS, USERS, and ADD USERS. Below this, there are three tabs: Single User (selected), Bulk User, and Unprocessed Users. The main form area is titled '2a' and contains the following fields:

- Title:** Other Licensed Healthcare Practitioner
- \*Organization:** --None--
- \*User Type:** --None-- (This field is highlighted with a red border and a red callout bubble labeled '2a').  
*Complete this field.*
- \*First Name:** (Input field)
- \*Last Name:** (Input field)
- \*Email:** (Input field)
- \*Department:** --None--
- State License:** --None--

At the bottom of the form are two buttons: 'Submit' and 'Cancel'.

# HIE Admin User Guide – Adding Individual Users

3

## Submitting a New User & Attestation

HOME ACCOUNTS USERS ADD USERS

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

**3a**

(3a) Once all required fields are filled out press the *Submit* button at the bottom the form

(3b) After you click *Submit*, an attestation screen will appear, acknowledge the terms and conditions by clicking the check boxes then click *Confirm*

(3c) A green pop-up message will appear once User has been successfully onboarded

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

**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.

**3b**

**3c**

 Success

New User created successfully!



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# Creating Multiple Users

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# HIE Admin User Guide – Adding Multiple Users

1

## 1. Preparing the *Bulk Upload* Form

- (1a) Click the *Add Users* tab at the top of the home screen
- (1b) Click the *Bulk User* tab
- (1c) Click the “*Bulk User Template*” hyperlink within the “*Instructions*” section. Download, complete, and save as a .csv file prior to beginning the Bulk Upload process
- (1d) Select User Type - *NOTE: User Type – select “Portal” if you are an HIE Admin in WV, CT, AK; select Unified Landing Page if you are an HIE Admin in MD or DC*

The screenshot shows the 'ADD USERS' tab selected in the top navigation bar. The 'Bulk User' tab is also selected, indicated by an orange box and the label '1b'. The 'Instructions' section contains a bulleted list with callouts 1a through 1d. Callout 1a points to the 'ADD USERS' tab. Callout 1b points to the 'Bulk User' tab. Callout 1c points to the 'Bulk User Template' link. Callout 1d points to the 'User Type' selection area, which includes a checked checkbox for 'Portal (AK, CT, WV)' and an unchecked checkbox for 'Unified Landing Page (MD, DC)'. The 'Create Users' button is located below the instructions. The bottom of the screen shows a table header with columns: Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License, License Type, License State, and CDS.

HOME ACCOUNTS USERS **ADD USERS**

Single User **1b Bulk User** Unprocessed Users

**Instructions:**

- Please Download Template [Bulk User Template](#) **1c**
- Please Save the with .CSV Extension
- Choose a User Type by selecting the appropriate checkbox below. **1d**
- Please use Upload File button to upload users.
- Click Create Users button to create users.
- Check status column for success or error messages.

**1d**

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
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# HIE Admin User Guide – Adding Multiple Users

## Uploading Files

2

(2a) Click *Upload Files* to select your file. Please note, the file must be saved as a .csv file. All other file formats will not be accepted

Note: Follow this same process to reactivate a User that is currently deactivated. Access to services for these Users must be provisioned again, see Provisioning Services section for detailed instructions.

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User Unprocessed Users

### 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.

2a

Or drop files

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
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# HIE Admin User Guide – Adding Multiple Users

(3a) Select *Create Users* to import your list into the HIE database

3

## Creating Users

Single User   Bulk User Bulk User   Unprocessed Users

### 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.

3a

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

# HIE Admin User Guide – Adding Multiple Users

4

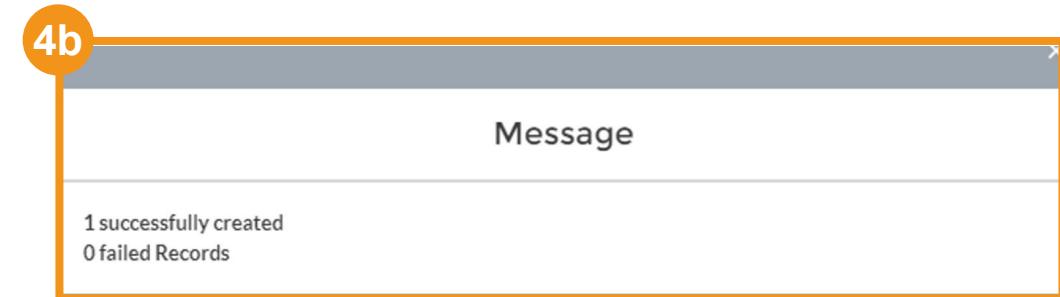
## Submitting Updated Users & Attestation

(4a) Once you've selected Create Users, an attestation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click *Confirm*

(4b) 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.



# HIE Admin User Guide – Reprocessing Users with Errors

## 5 Users with Errors

(5a) 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  
(5b) 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*

Single User Bulk User Unprocessed Users

**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   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
5b	Reprocess Users												
5a	Error Message	Title	Organization	First Name	Last Name	PDMP Specialty							
	Please Provide Valid NPI	Physician	Junior Smoke Test	Yello70	Clouds70								

# User Search

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# HIE Admin User Guide – User Search

1

## Locating a User

(1a) Enter User's first name, last name or email address in the search bar at the top of any page  
(1b) Search by data in any column in the **Users** tab: Name, Member Title, Account Name, Email, User Status  
(1c) Enter the User's first or last name in the search bar in the User **Audit Page**

The screenshot displays the HIE Admin Portal interface with three distinct search areas, each highlighted with an orange circle and labeled 1a, 1b, and 1c.

- 1a:** Located at the top of the portal, above the main menu. It features a search bar with the placeholder "Search..." and a blue "SEARCH" button to its right.
- 1b:** Located within the "Users" tab of the main content area. It shows a list of users with columns for Name, Member Title, Account Name, Email, Phone, and User Status. A search bar with the placeholder "Search this list..." is positioned above the list, with an orange box highlighting it.
- 1c:** Located on the "User Audit Page" at the bottom of the interface. It features a search bar with the placeholder "Search" and a blue "Approve All" button to its right. Below the search bar, there are tabs for "Active User" and "Suspended User".

**Users Tab Data:**

	Name	Member Title	Account Name	Email	Phone	User Status
1	Ada1 Gibbler	Cancer Registrar	University of Bacon Baltimore	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

# Viewing Account Services

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# HIE Admin User Guide – Account Services

1

## View Account Services

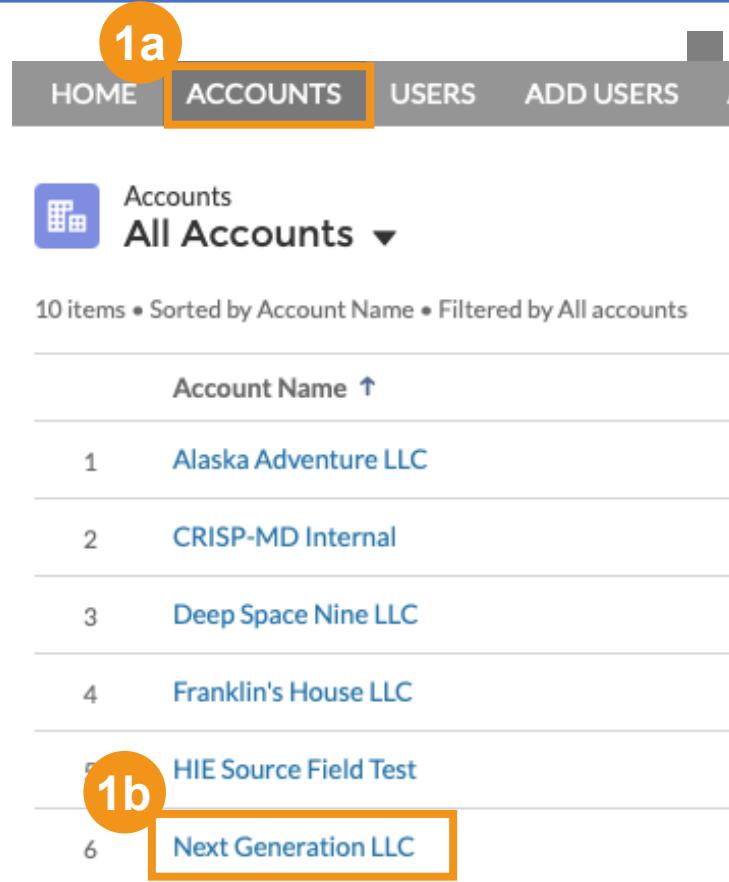
(1a) Select Accounts tab

(1b) Click on an Account Name

(1c) 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

1a



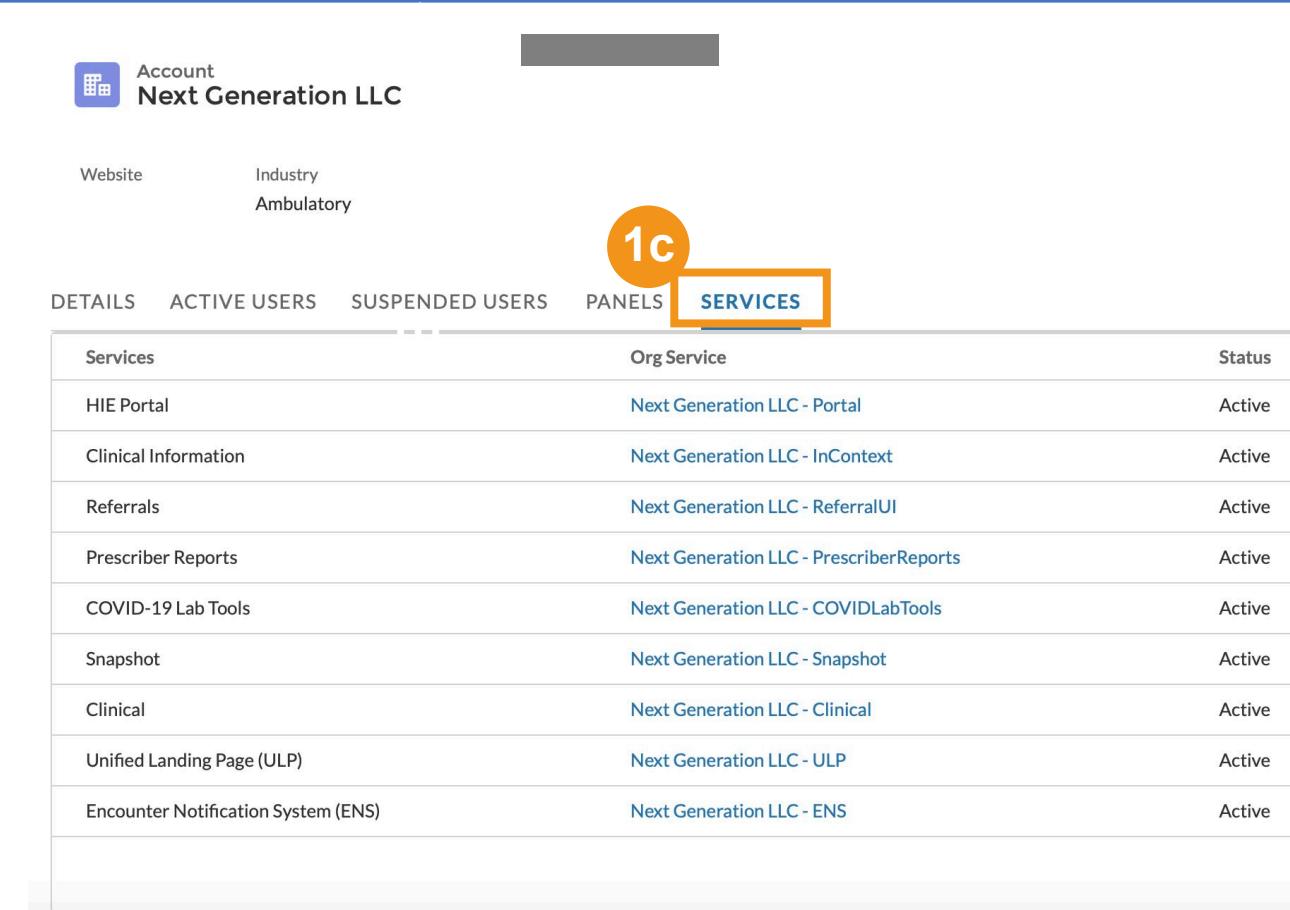
HOME ACCOUNTS USERS ADD USERS A

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

1c



Account  
Next Generation LLC

Website: [redacted] Industry: Ambulatory

DETAILS	ACTIVE USERS	SUSPENDED USERS	PANELS	SERVICES	
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

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# HIE Admin User Guide – Provisioning a Service: Multiple Users

## 1 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)

(1a) Select the Account associated with the Users who need access to a service

(1b) 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 ACTIVE USERS SUSPENDED USERS PANELS SERVICES

Account Name

Next Generation LLC

Parent Account

Industry

Ambulatory

1a

1b

# HIE Admin User Guide – Provisioning a Service: Multiple Users

## 2 Select Service

(2a) Identify service name in the "Service" column

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

(2b) Click on the Org Service blue hyperlink (next to the Service) you would like to provision to Users

(2c) Click *Assign Service*



Website: Ambulatory  
Industry: Ambulatory

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

2a

2b

### Asset Next Generation LLC - Snapshot

Account: Next Generation LLC  
Contact: [Contact](#)  
Product: [Snapshot](#)  
Status: Active  
Install Date: 1/11/2022

#### DETAILS RELATED

Asset Name: Next Generation LLC - Snapshot  
Status: Active  
Install Date: 1/11/2022  
Usage End Date: [Usage End Date](#)  
Deactivation Reason: [Deactivation Reason](#)

2c  
[Assign Service](#)

# HIE Admin User Guide – Provisioning Services: Multiple Users

## 3 Select Access/Users

**Select Access:** Select how your Users will access this service

(3a) Select HIE Portal if you have migrated to the new HIE Portal, otherwise select ULP

(3b) Click *Select Users*

(3c) Select the User(s) you are granting access this service by checking the box next to their name

(3d) 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).

3a

Product Name

1	<input checked="" type="checkbox"/> HIE Portal
2	<input type="checkbox"/> Unified Landing Page (ULP)

\* required

3b

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"/> Alnerer1 chestington1	alnerer1chestington1...	
2	<input checked="" type="checkbox"/> Alnerer10 chestingto...	alnerer10chestington...	
	<input type="checkbox"/> Alnerer100 chestingt...	alnerer100chestingto...	
	<input checked="" type="checkbox"/> Alnerer101 chestingt...	alnerer101chestingto...	

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

3c

Confirm Selections

# HIE Admin User Guide – Provisioning Services: Multiple Users

## 4 Confirm Selections

### Confirm Selections:

(4a) Review and confirm list of users who should access this service

(4b) click *Complete!*

(4c) 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:

4a

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

4b

Previous > Complete!

Assign Service

Assign Snapshot Service

Select Access > ✓ > ✓ > ✓ > Complete!

Success!

4c

Finish

# HIE Admin User Guide – Provisioning Services: Single User

## 5 Provisioning a service to a single User

HIE Administrators can provision a service to a single User

- (5a) Access the active User using the search bar at the top of any page or through the *Users* tab
- (5b) Click on the User's name
- (5c) Click *Assign Services* in the top right corner



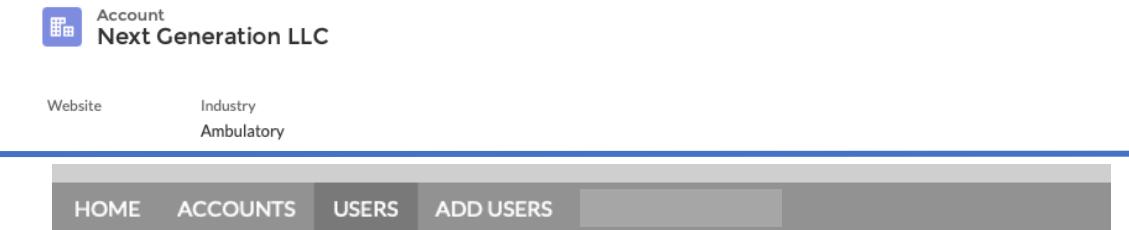
5a

Search...

HOME ACCOUNTS **USERS** ADD USERS

Account  
Next Generation LLC

Website Industry  
Ambulatory



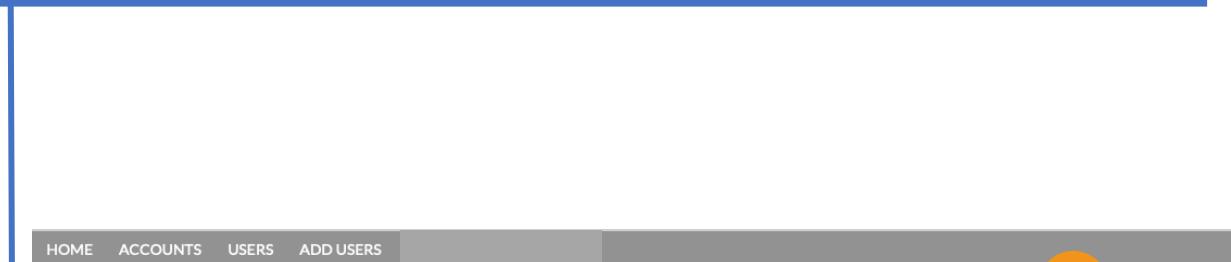
5b

HOME ACCOUNTS **USERS** ADD USERS

Contacts  
All Contacts

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

	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



5b

Contact  
Alaskan Salmon

Title Account Name Phone Email Contact Owner Audit By  
Alaska Adventure LLC test@alaskhecak.com Jennifer Jones Marilyn Monroe1

DETAILS RELATED

Name  
Alaskan Salmon

Account Name  
Alaska Adventure LLC

Contact Owner  
Jennifer Jones

Email  
test@alaskhecak.com

# HIE Admin User Guide – Provisioning Services: Single User

## 6 Assign Services

(6a) Assign Services: Select Service (note: only one service may be selected at a time), Click Next

(6b) Select Access: Select how User will access this service (Choose HIE Portal unless otherwise notified), Click Next

(6c) 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).

Snapshot

Encounter Notification System (ENS)

Snapshot

ENS

6a

Next

Assign Services

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

HIE Portal

Portal

6b

Previous

Next

Assign Services

6c

Finish

Mobile

# Password Reset

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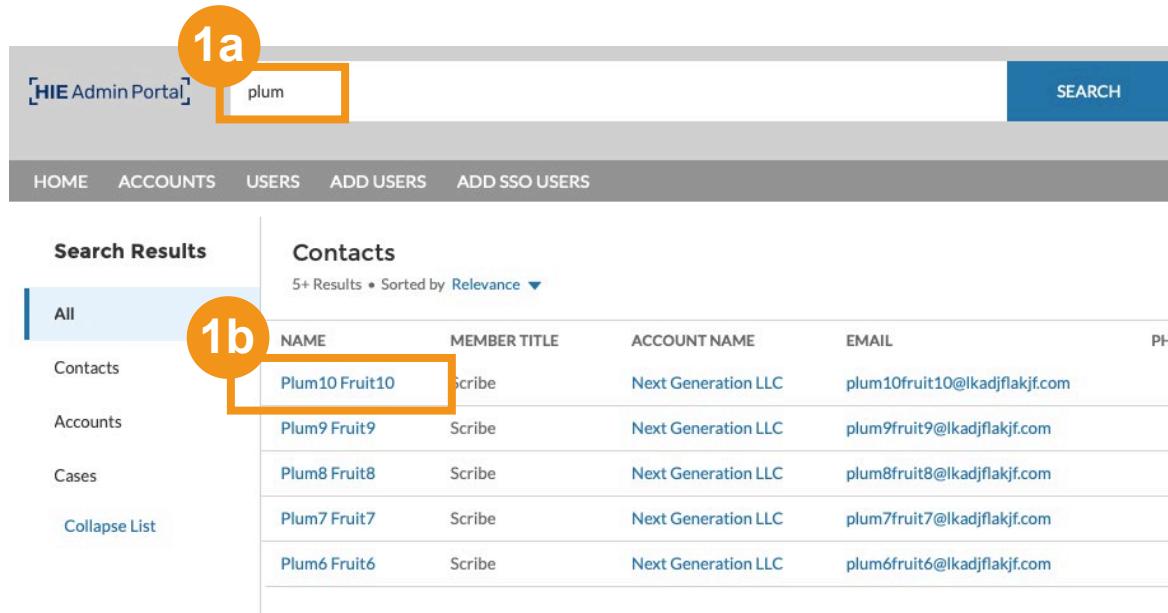
# HIE Portal – Password Reset

1

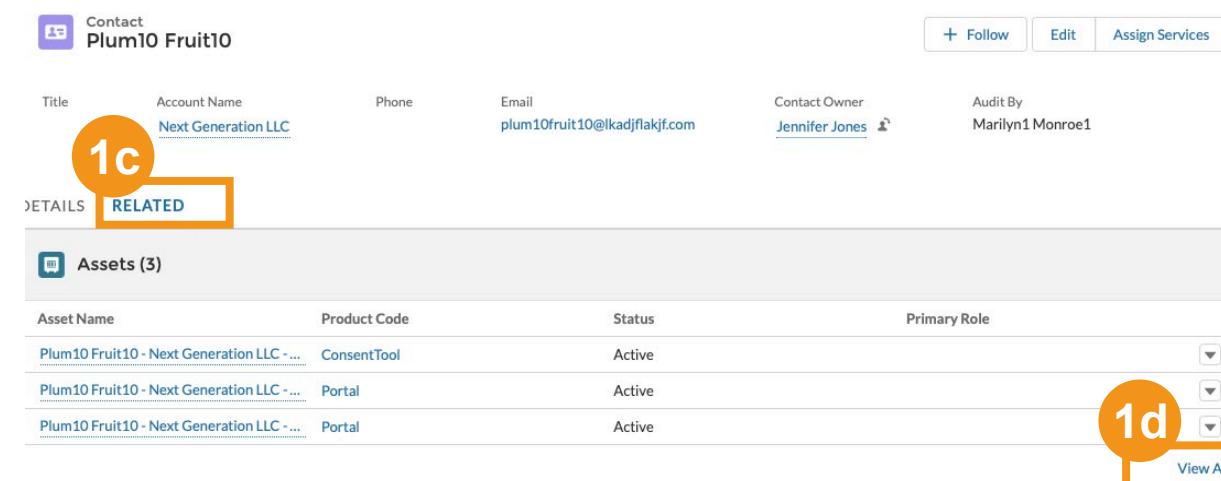
## User Password Reset

User [HIE Portal](#) password can be reset in the HIE Admin Tool

- (1a) Search for User
- (1b) Click on User's name
- (1c) Click on *Related* tab
- (1d) Click View All to expand view



The screenshot shows the HIE Admin Portal search interface. A search bar at the top contains the text 'plum'. Below the search bar, a 'SEARCH' button is visible. The main area is titled 'Search Results' and shows a table of 'Contacts'. The table has columns: NAME, MEMBER TITLE, ACCOUNT NAME, EMAIL, and PHO. The 'NAME' column lists contacts such as 'Plum10 Fruit10', 'Plum9 Fruit9', 'Plum8 Fruit8', 'Plum7 Fruit7', and 'Plum6 Fruit6'. The 'MEMBER TITLE' column shows 'Scribe' for all contacts. The 'ACCOUNT NAME' column shows 'Next Generation LLC' for all contacts. The 'EMAIL' column shows email addresses like 'plum10fruit10@lkadjflakjf.com'. The 'PHO' column is partially visible. On the left, a sidebar lists 'All', 'Contacts', 'Accounts', 'Cases', and 'Collapse List'. A callout bubble labeled '1a' is positioned over the search bar, and another labeled '1b' is positioned over the 'NAME' column of the search results table.



The screenshot shows the HIE Admin Tool contact details for 'Plum10 Fruit10'. At the top, there is a 'Contact' icon and the name 'Plum10 Fruit10'. Below this are fields for 'Title' (empty), 'Account Name' ('Next Generation LLC'), 'Phone' (empty), 'Email' ('plum10fruit10@lkadjflakjf.com'), 'Contact Owner' ('Jennifer Jones'), and 'Audit By' ('Marilyn1 Monroe1'). Below these details, there are two tabs: 'DETAILS' and 'RELATED'. The 'RELATED' tab is highlighted with a callout bubble labeled '1c'. Below the tabs, there is a section titled 'Assets (3)' with a table. The table has columns: Asset Name, Product Code, Status, and Primary Role. It lists three assets: 'Plum10 Fruit10 - Next Generation LLC - ...' with Product Code 'ConsentTool' and Status 'Active'; 'Plum10 Fruit10 - Next Generation LLC - ...' with Product Code 'Portal' and Status 'Active'; and 'Plum10 Fruit10 - Next Generation LLC - ...' with Product Code 'Portal' and Status 'Active'. A callout bubble labeled '1d' is positioned over the 'View All' button in the bottom right corner of the asset table.

# HIE Portal – Password Reset

2

## User Password Reset

(2a) Click on the Asset Name associated with **Portal only**:  
<username><account name>Portal

Contacts > Plum10 Fruit10

**Assets**

3 items • Sorted by Install Date, Asset Name, Serial Number • Updated a few seconds ago

Asset Name ↑ Product Code Status Primary Role Account Name

	Asset Name ↑	Product Code	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="▼"/>

2a

# HIE Portal – Password Reset

3

## User Password Reset

(3a) Click on *HIE Portal User Management*  
(3b) Read the instructions then click on *Confirm Reset*

Asset  
Plum10 Fruit10 - Next Generation LLC - Portal

Account	Contact	Product	Status	Install Date
<a href="#">Next Generation LLC</a>	<a href="#">Plum10 Fruit10</a>	<a href="#">HIE Portal</a>	Active	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

3a

[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.

3b

[Confirm Reset](#)

[Cancel](#)

# Editing User Details

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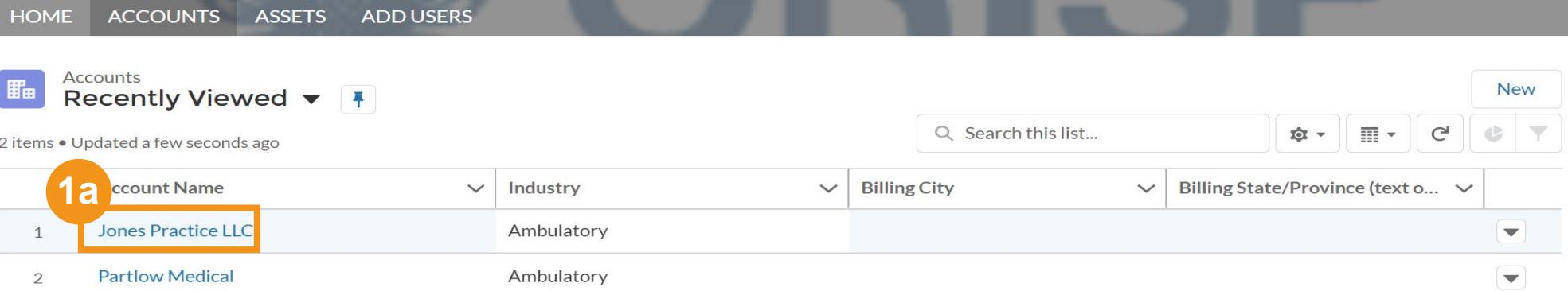
# HIE Admin User Guide – Editing User Details

1

## Choosing an Account

(1a) Choose the Account you would like to view by clicking on the Account Name

(1b) Select *ACTIVE USERS* or *SUSPENDED USERS* tab to view users listed with the Account

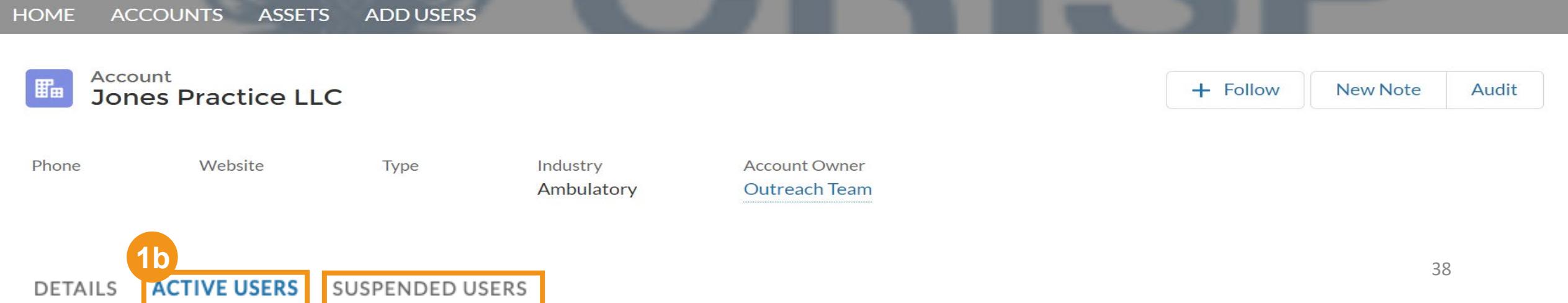


HOME ACCOUNTS ASSETS ADD USERS

Accounts Recently Viewed ▾

2 items • Updated a few seconds ago

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



HOME ACCOUNTS ASSETS ADD USERS

Account Jones Practice LLC

+ Follow New Note Audit

Phone	Website	Type	Industry	Account Owner
			Ambulatory	Outreach Team

DETAILS ACTIVE USERS SUSPENDED USERS

# HIE Admin User Guide – Editing User Details

2

## Viewing and Selecting a Contact

(2a) Choose the Contact (User) you would like to view by clicking on the Contact Name

(2b) Select *View All* if your contact is not on the initial list

HOME ACCOUNTS ASSETS ADD USERS

Account Test Account

+ Follow New Note Audit

Phone Website Type Industry Account Owner

Hospital Avideoon CRISP

DETAILS ACTIVE USERS SUSPENDED 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		lalexander@randatmail.c
Stella Alexander	Active		s.alexander@randatmail

New Contact Add Relationship

2a

2b

View All

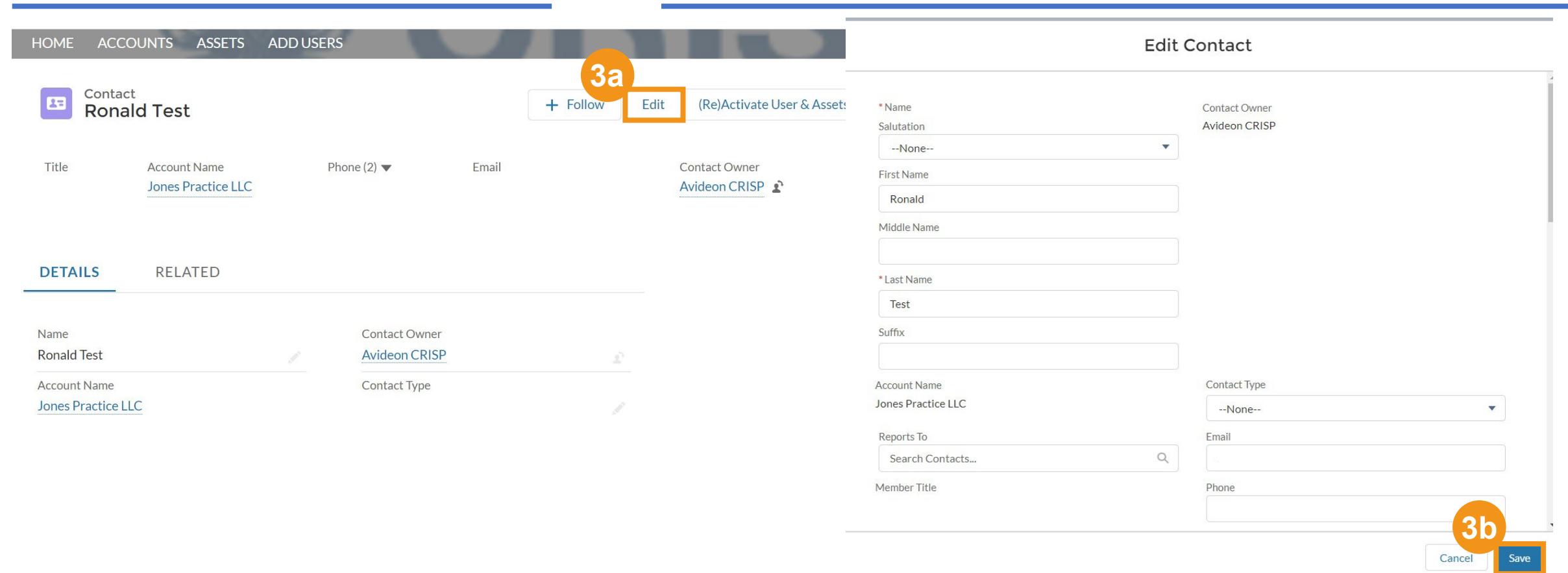
# HIE Admin User Guide – Editing User Details

3

## Editing and Saving a Contact

(3a) Select *Edit* to update the contact's information

(3b) Select *Save* to confirm the updated information



The screenshot shows the 'Edit Contact' interface. On the left, a contact card for 'Ronald Test' is displayed with fields for Title (Title), Account Name (Jones Practice LLC), Phone (2), Email, and Contact Owner (Avideon CRISP). Below this are 'DETAILS' and 'RELATED' sections. On the right, the 'Edit Contact' form is open, showing fields for Name (Name, Salutation, First Name, Middle Name, Last Name, Suffix), Account Name (Account Name, Reports To, Member Title), Contact Type (Contact Type, Email, Phone), and Contact Owner (Contact Owner). The 'Edit' button on the contact card and the 'Save' button on the right are highlighted with orange circles and labeled '3a' and '3b' respectively.

HOME ACCOUNTS ASSETS ADD USERS

Contact Ronald Test

+ Follow Edit (Re)Activate User & Asset

Title Account Name Phone (2) Email

Contact Owner Avideon CRISP

DETAILS RELATED

Name Ronald Test

Contact Owner Avideon CRISP

Account Name Jones Practice LLC

Contact Type

3a

Edit Contact

\* Name

Salutation

--None--

First Name

Ronald

Middle Name

Last Name

Test

Suffix

Account Name

Jones Practice LLC

Contact Type

--None--

Reports To

Search Contacts...

Member Title

Email

Phone

3b

Cancel Save

# Glossary

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# 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.