

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.

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Accessing the Tool



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.conniect.org> → “HIE Admin Tool”

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



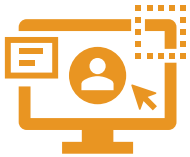
WELCOME!

User Verification Process

Tool Overview

A thick orange line that starts horizontally from the left edge, then rises diagonally to a peak, and finally descends diagonally to continue horizontally towards the right edge.

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



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

HOMEACCOUNTSUSERSADD USERS

Accounts

Recently Viewed

2 items • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Share

Filter

New

	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

Type

Industry

Account Owner

Ambulatory

Outreach Team

DETAILS

RELATED

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.

Search

2a

Active User

Suspended User

Active Users

Approve Current Page

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

2d

Complete Audit

Cancel

HIE Admin User Guide – Managing Existing Users

3 Managing Suspended Users

- (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.

3a

Active UserSuspended User

Suspended Users

Approve Current Page

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

3c

Complete AuditCancel

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

4aFinish

4b

Success

All records Successfully Updated

Creating Individual Users



HIE Admin User Guide – Adding Individual Users

1

Selecting a Title

(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.

HOMEACCOUNTSASSETSADD USERS

Single UserBulk UserUnprocessed Users

Title

-None-

SubmitCancel

Title

Other Non-Licensed Staff

None-

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*

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User Unprocessed Users

2a

Title

Other Licensed Healthcare Practitioner

* Organization

--None--

* User Type

--None--

Complete this field.

* First Name

* Last Name

* Email

* Department

--None--

State License

--None--

Submit

Cancel

HIE Admin User Guide – Adding Individual Users

3

Submitting a New User & Attestation

HOMEACCOUNTSUSERSADD USERS

Single UserBulk UserUnprocessed Users

Title

Other Licensed Healthcare Practitioner

Organization

--None--

User Type

--None--

First Name

Last Name

Email

Department

--None--

State License

--None--

Phone

3a

SubmitCancel

- (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 log-in credentials with another individual.

3b

ConfirmCancel

3c

✓

Success

New User created successfully!

✕

Creating Multiple Users



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*

HOME

ACCOUNTS

USERS

1a

ADD USERS

Single User

1b

Bulk User

Unprocessed Users

Instructions:

• Please Download Template

1c

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)

1d

☒

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

2

Uploading Files

(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

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

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

3

Creating 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.

3a

Create Users

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.

4a

Confirm

Cancel

4b

Message

1 successfully created
0 failed Records

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

HOMEACCOUNTSUSERSADD USERS

Single UserBulk UserUnprocessed 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 FilesOr 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
<div>5b</div> <div>Reprocess Users</div>													
<div>5a</div> <div>Error Message</div>													
Please Provide Valide NPI													
Physician		Junior Smoke Test		Yello70		Clouds70							

21

User Search

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**

1a

HIE Admin Portal

Search...

SEARCH

1b

HOMEACCOUNTSUSERSADD USERS

Contacts

Recently Viewed

25 items • Sorted by Name

Search this list...

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

HOMEACCOUNTSASSETSADD USERS

1c

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 UserSuspended User

Active Users

Approve All

Viewing Account Services



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

HOMEACCOUNTSUSERSADD USERSA

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

1c

DETAILSACTIVE USERSSUSPENDED USERSPANELSSERVICES

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



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

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

1a



Account
Next Generation LLC

Website

Industry
Ambulatory

DETAILS

ACTIVE USERS

SUSPENDED USERS

PANELS

1b

SERVICES

Account Name

Next Generation LLC

Parent Account

Industry

Ambulatory

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*

Account
Next Generation LLC

Website
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

Asset
Next Generation LLC - Snapshot

Account
[Next Generation LLC](#)

Contact

Product
[Snapshot](#)

Status
Active

Install Date
1/11/2022

DETAILS RELATED

Asset Name
Next Generation LLC - Snapshot

Account
[Next Generation LLC](#)

Usage End Date

Status
Active

Install Date ⓘ
1/11/2022

Deactivation Reason

2a

2b

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 name to their name
 - (3d) Click *Confirm Selections*

Assign Service

Assign Snapshot Service

Select AccessSelect UsersConfirm SelectionsComplete!

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 UsersConfirm SelectionsComplete!

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.

3c

	Name	Email	Member Title
1	<input type="checkbox"/> Aalnerer1 chestington1	aalnerer1chestington1...	
2	<input checked="" type="checkbox"/> Aalnerer10 chestingto...	aalnerer10chestington...	
	<input type="checkbox"/> Aalnerer100 chestingt...	aalnerer100chestingto...	
	<input checked="" type="checkbox"/> Aalnerer101 chestingt...	aalnerer101chestingto...	

3d

Confirm Selections

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

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

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...	

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

HIE Admin Portal

Search...

SEARCH

HOME

ACCOUNTS

USERS

ADD USERS

Account

Next Generation LLC

Website

Industry

Ambulatory

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

HOME

ACCOUNTS

USERS

ADD USERS

Contact

Alaskan Salmon

+ Follow

Assign Services

Title

Account Name

Phone

Email

Contact Owner

Audit By

[Alaska Adventure LLC](#)

[test@alaskhecak.com](#)

[Jennifer Jones](#)

[Marilyn1 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).

Select ONE Service below:

Snapshot
Snapshot

Encounter Notification System (ENS)
ENS

6a

Next

Assign Services

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

Select Access

HIE Portal
Portal

6b

Previous

Next

Assign Services

6c

Finish

32

Password Reset



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

HIE Admin Portal

plum

SEARCH

HOMEACCOUNTSUSERSADD USERSADD SSO 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

DETAILS

RELATED

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	

View All

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	
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	▼

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

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

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



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

HOMEACCOUNTSASSETSADD USERS

Accounts

Recently Viewed

2 items • Updated a few seconds ago

1a

1

Jones Practice LLC

2

Partlow Medical

Account Name

Industry

Billing City

Billing State/Province (text o...

Ambulatory

Ambulatory

Search this list...

Settings

Grid

Refresh

Chart

Filter

New

HOMEACCOUNTSASSETSADD USERS

Account

Jones Practice LLC

+ Follow

New Note

Audit

Phone

Website

Type

Industry

Account Owner

Ambulatory

Outreach Team

1b

DETAILS

ACTIVE USERS

SUSPENDED USERS

38

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

HOMEACCOUNTSASSETSADD USERS

Account Test Account

+ FollowNew NoteAudit

Phone

Website

Type

Industry Hospital

Account Owner Avideon CRISP

DETAILS

ACTIVE USERS

SUSPENDED 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
Lillanna Alexander	Active		lalexander@randatmail.c
Stella Alexander	Active		salexander@randatmai

2bView 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

HOME ACCOUNTS ASSETS ADD USERS

Contact

Ronald Test

+ Follow

Edit

(Re)Activate User & Assets

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

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

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.