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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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@conniect.org

healtheConnect Alaska:
P: 907-770-2626
E: help@ak-ehealth.org

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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.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


1a

HOME   ACCOUNTS   USERS   ADD USERS

WELCOME!

User Verification Process

Tool Overview

Tool Overview

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
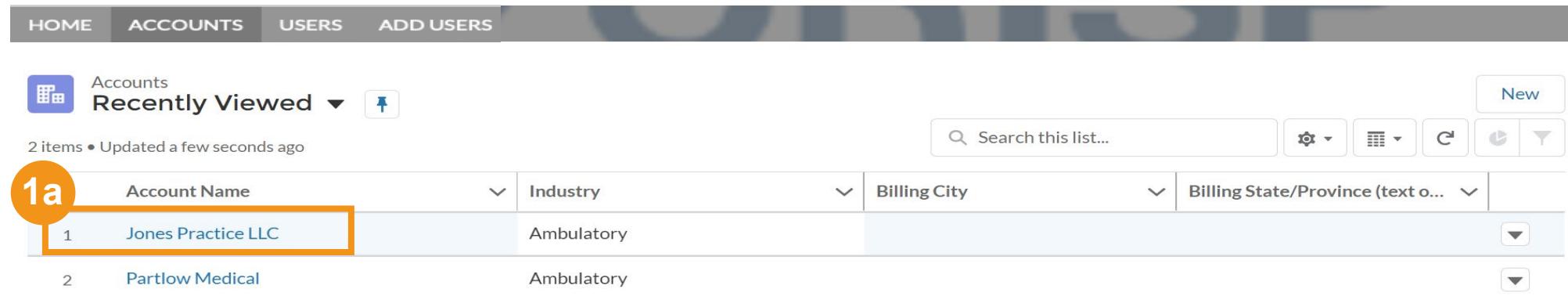
HIE Admin User Guide – Managing Existing Users

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
2b Approve Deny	HIE AdminEmail	mpartlow@avideon.com				
Approve **2c** Deny	Juan Gonzalez					

2d [Complete Audit]   [Cancel]   9

HIE Admin User Guide – Managing Existing 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.

3 ## Managing Suspended Users

3a

Active User   Suspended User

Suspended Users

Approve Current Page

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

3b

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 **4a** **Finish**

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.

1a

HOME	ACCOUNTS	ASSETS	ADD USERS

Single User   Bulk User   Unprocessed Users

* Title

-None-

[Submit]   [Cancel]

Title

Other Non-Licensed Staff

1b
-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*
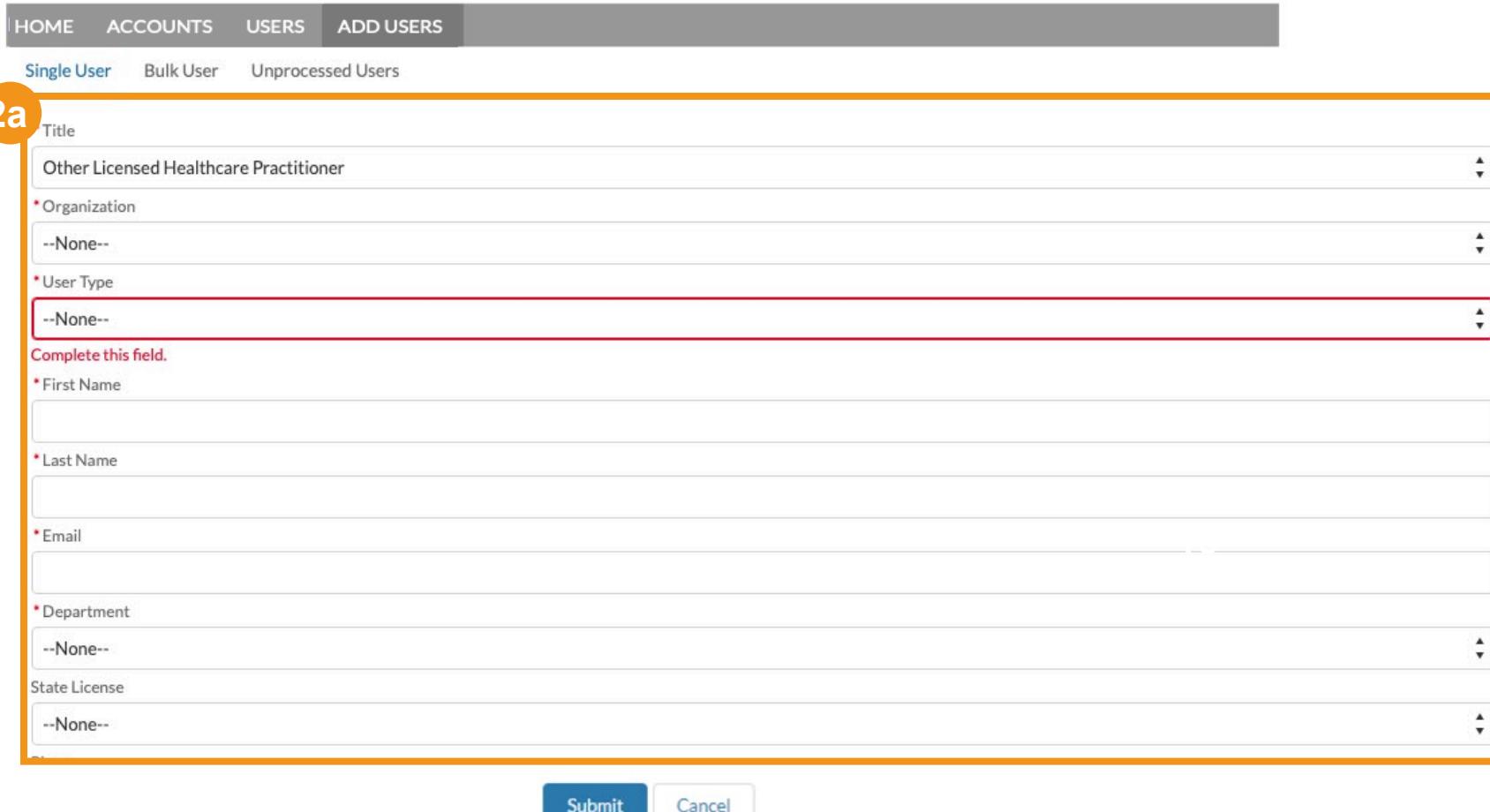
HOME   ACCOUNTS   USERS   ADD USERS

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

(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

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

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.

Confirm   Cancel

✔ **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

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

Instructions:

- Please Download Template **1c** Bulk User Template
- Please Save the with .CSV Extension
- **1d** 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.

Portal (AK, CT, WV) ☑

Unified Landing Page (MD, DC) ☐

Create Users

⬆ Upload Files   Or drop files

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

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.

Portal (AK, CT, WV) ☑   Unified Landing Page (MD, DC) ☐

Create Users

2a ⬆ Upload Files   Or drop files

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

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

⬆ 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 log-in 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 <u>uncorrected</u> 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

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

| HOME | ACCOUNTS | USERS | ADD USERS |

Contacts
Recently Viewed ▼ 📌

25 items • Sorted by Name

🔍 Search this list... ⚙️▾ ✏️

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

| HOME | ACCOUNTS | ASSETS | ADD USERS |

HIE Admin - User Audit Page

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

1c

🔍 Search

Active User   Suspended 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
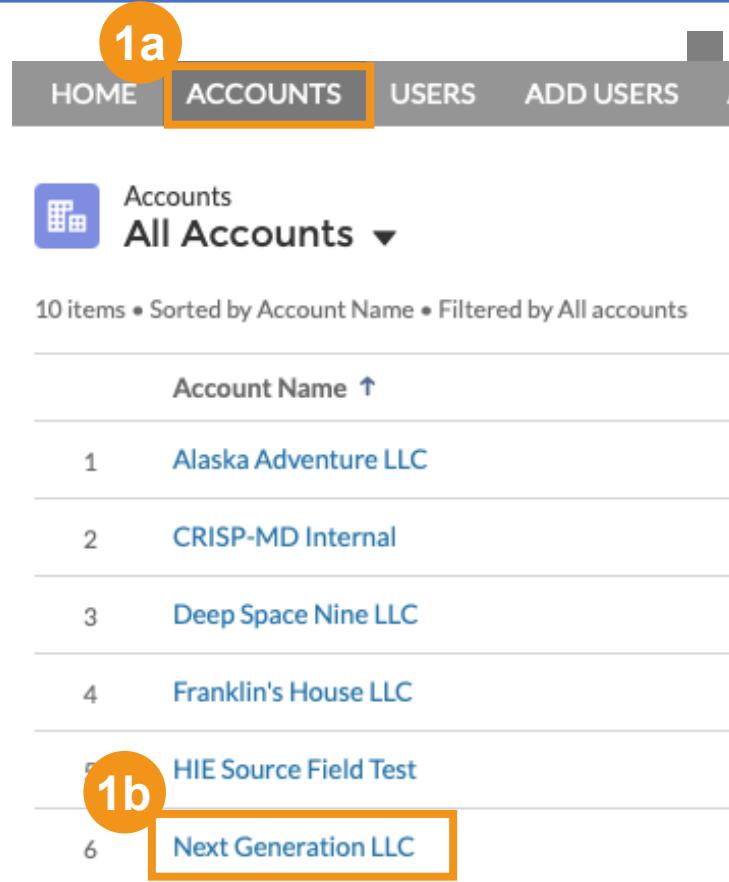
| HOME | ACCOUNTS | USERS | ADD USERS | A |

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
1b 6	Next Generation LLC

Account
Next Generation LLC

Website	Industry
	Ambulatory

1c

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

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

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

2a **2b**

2c   Assign Service

Asset
Next Generation LLC - Snapshot

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

DETAILS   RELATED

Asset Name
Next Generation LLC - Snapshot

Account
Next Generation LLC

Usage End Date

Status
Active

Install Date
1/11/2022

Deactivation Reason

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*

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*

(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 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.

Password Reset

HIE Portal – Password Reset

User <u>HIE Portal</u> password can be reset in the HIE Admin Tool

(1) **User Password Reset**

(1a) Search for User
(1b) Click on User's name
(1c) Click on *Related* tab
(1d) Click View All to expand view
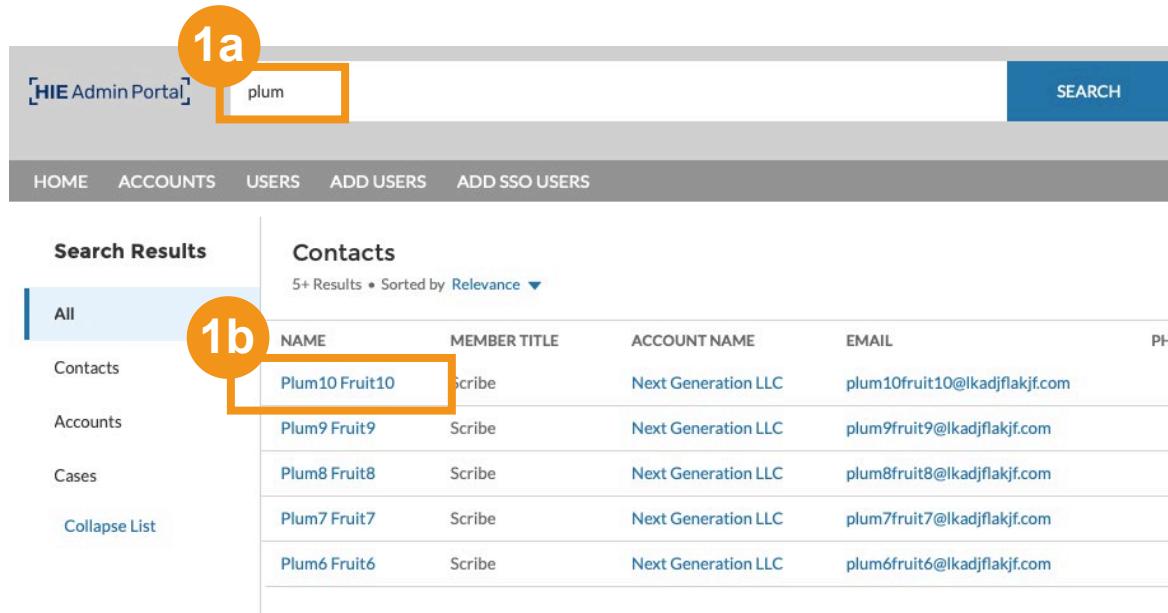
HIE Portal – Password Reset

2 **User Password Reset**

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

HIE Portal – Password Reset

3 **User Password Reset**

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

3a

HIE Portal User Management

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

Account
Next Generation LLC

Product ⓘ
HIE Portal

Status
Active

Contact
Plum10 Fruit10

Username ⓘ
plum10fruit10@lkadjflakjf.com

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
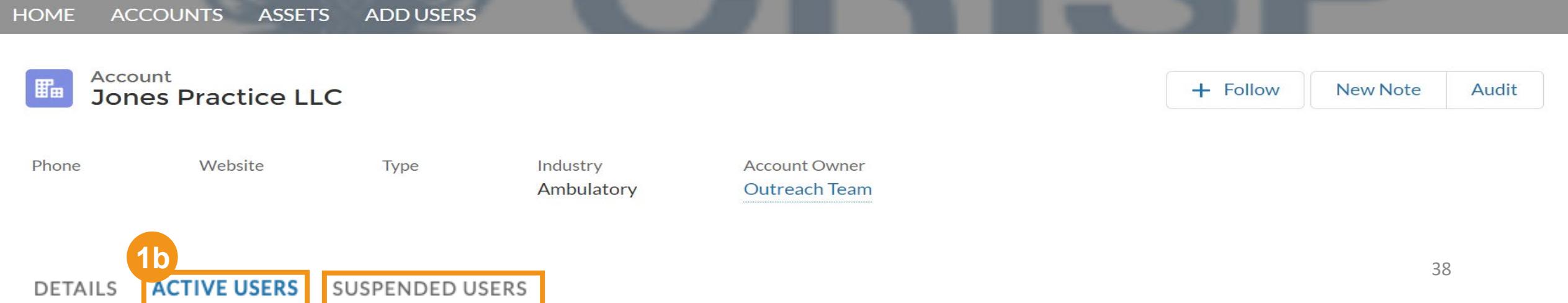
HIE Admin User Guide – Editing User Details

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

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

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.