

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

VHI:

P: 866-948-0882

E: vhisupport@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

healthConnect Alaska:

P: 907-770-2626

E: help@ak-ehealth.org

Table of Contents

Topic	Page Number
HIE Support Service	1
Tool Overview	3
Accessing the Tool	5
Managing Existing Users	7
Creating Individual Users	12
Creating Multiple Users	17
Provisioning Services	23
Deactivating Services	29
User Search	32
Password / Activation Email Reset	34
Editing User Details	38
Bulk Export User List	43
Glossary	46

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.

Accessing the Tool

A thick orange line that starts horizontally from the left edge, rises to a peak in the upper right quadrant, and then descends to a horizontal line that continues to the right edge.

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

DC 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.connict.org> → “HIE Admin Tool”

AK users – Log on to: healthHUB Portal <https://hub.healthconnectak.org/> → “HIE Admin Tool”

VA users – Log on to: <https://portal.vhi.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

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

DC 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.connict.org> → “HIE Admin Tool”

AK users – Log on to: healthHUB Portal <https://hub.healthconnectak.org/> → “HIE Admin Tool”

VA users – Log on to: <https://portal.vhi.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

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

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

2b

Approve Current Page

Status	Name	Email	Member Title	Department	Audit Date	Audit By
<p>2b</p> <p>Approve Deny</p>	HIE AdminEmail	mpartlow@avideon.com				
<p>2c</p> <p>Approve Deny</p>	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 90 days will be deactivated. If a suspended User is approved, remind the User to reset their password if unable to log in.

3a

Active User Suspended User

Suspended Users Approve Current Page

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

3c Complete Audit Cancel

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

A decorative orange line that starts as a horizontal line on the left, rises to a peak in the middle, and then descends to a horizontal line on the right.

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

(1b) Ensure "Single User" is underlined

(1c) Select applicable Title from drop-down list

The screenshot displays the HIE Admin User Guide interface. At the top, a navigation bar contains the following tabs: HOME, ACCOUNTS, USERS, and ADD USERS. The 'ADD USERS' tab is highlighted with an orange box and labeled '1a'. Below the navigation bar, there are two options: 'Single User' and 'Bulk User'. The 'Single User' option is underlined with a blue line and labeled '1b'. Below these options is a form field for 'Title' with a red asterisk indicating it is required. The dropdown menu is currently set to '-None-' and is highlighted with a red box and labeled '1c'. Below the dropdown menu, there are two buttons: 'Submit' and 'Cancel'. At the bottom of the screenshot, a dropdown menu is open, showing a list of titles: '-None-', Cancer Registrar, Certified Nurse Midwife, Clinical Pharmacist, Dentist, Licensed Clinical Social Worker, LTC Consultant Pharmacist, Medical Assistant, and Nurse Practitioner. The '-None-' option is selected and highlighted with a blue bar, and the entire dropdown menu is highlighted with an orange box and labeled '1c'.

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”*

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User

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 (see next slide for error guidance)

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

The screenshot displays the 'ADD USERS' interface. At the top, a navigation bar includes 'HOME', 'ACCOUNTS', 'USERS', and 'ADD USERS'. Below this, there are tabs for 'Single User' and 'Bulk User'. The form contains several fields: 'Title' (with a dropdown menu showing 'Other Licensed Healthcare Practitioner'), 'Organization' (dropdown menu showing '--None--'), 'User Type' (dropdown menu showing '--None--'), 'First Name', 'Last Name', 'Email', 'Department' (dropdown menu showing '--None--'), 'State License' (dropdown menu showing '--None--'), and 'Phone'. At the bottom of the form are 'Submit' and 'Cancel' buttons. A callout '3a' points to the 'Submit' button.

Overlaid on the right side is a 'Confirm' dialog box. It contains two checked checkboxes with their respective text: '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.' and '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.' At the bottom right of the dialog are 'Confirm' and 'Cancel' buttons. A callout '3b' points to the 'Confirm' button.

At the bottom of the screen, a green success message pop-up is visible, stating 'Success New User created successfully!' with a checkmark icon and a close button. A callout '3c' points to this message.

HIE Admin User Guide – Adding Individual Users

4 New User Creation Error

(4a) Reference from previous slide: Once attestations are checked and you click *Confirm*, the system will verify the email address submitted on the new User creation request

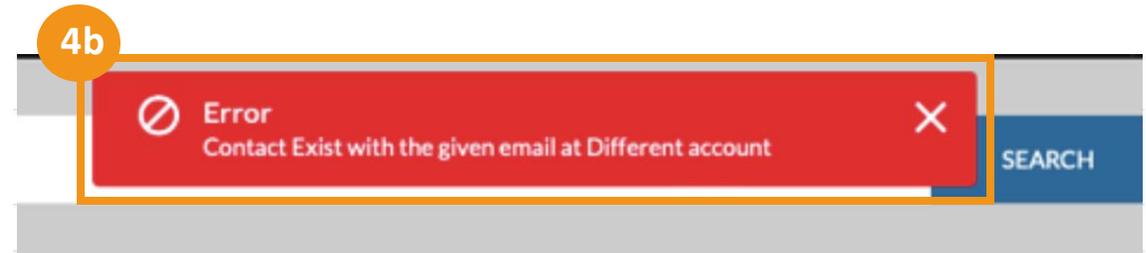
(4b) Upon attempt to create a new User with an email address that is already in the system, you will receive an error message: **Contact Exists with the given email at a different account**. This could be at an account you manage or another account within the system

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

Confirm

- As a designated HIE Administrator or Point of Contact, on behalf of the above organization, I attest the Authorized User is a member of the organization's workforce and their identity has been verified in accordance with requirements outlined in the HIE policies and procedures as applicable.
- I attest that the organization has a copy of the Health Information Exchange (HIE) participation agreement and the corresponding policies and procedures found on the HIE website. In addition, I attest that all Authorized Users have received education or training on the HIE policies and procedures as applicable and have agreed to adhere to those applicable to Authorized Users, including the prohibition against sharing log-in credentials with another individual.

4a



Creating Multiple Users



HIE Admin User Guide – Adding Multiple Users

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

HOME ACCOUNTS USERS **ADD USERS**

Single User **Bulk User**

Instructions:

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

Portal |

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

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**

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



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**

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

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	Jullian	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

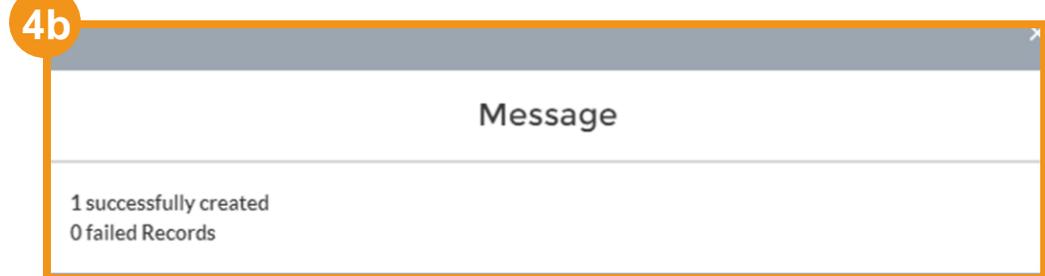
4 Submitting Updated Users & Attestation

(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

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User

Instructions:

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

Upload Files Or drop files Create Users

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

5b Reprocess Users

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

5a

Provisioning Services

A thick orange horizontal line spans the width of the slide. In the right half, it rises to a peak and then descends to a lower horizontal level, creating a stylized mountain or roof-like shape.

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 – the Service tab will display all services available for Admins to add to users of this account

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

Account
Next Generation LLC

Website
Industry
Ambulatory

DETAILS PANELS **SERVICES** ACTIVE USERS SUSPENDED USERS

Account Name
Next Generation LLC

Parent Account

Industry
Ambulatory

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 PANELS **SERVICES** ACTIVE USERS SUSPENDED USERS

Services	Org Service	Status
HIE Portal	Next Generation LLC - Portal	Active
Clinical Information	Next Generation LLC - InContext	Active
Referrals	Next Generation LLC - ReferralUI	Active
Prescriber Reports	Next Generation LLC - PrescriberReports	Active
COVID-19 Lab Tools	Next Generation LLC - COVIDLabTools	Active
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	Contact	Product	Status	Install Date
Next Generation LLC		Snapshot	Active	1/11/2022

DETAILS RELATED

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

2c [Assign Service](#)

HIE Admin User Guide – Provisioning Services: Multiple Users

Select Access: Select how your Users will access this service

(3a) Click *Select Users*

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

(3c) Click *Confirm Selections*

3 Select Access/Users

Assign Service

Assign Snapshot Service



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

	<input type="checkbox"/>	Name	Email
1	<input type="checkbox"/>	Aalnerer1 chestington1	aalnerer1chestingt...
2	<input checked="" type="checkbox"/>	Aalnerer10 chestingto...	aalnerer10chestingt...
3	<input type="checkbox"/>	Aalnerer100 chestingt...	aalnerer100chestingt...
4	<input checked="" type="checkbox"/>	Aalnerer101 chestingt...	aalnerer101chestingt...

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

3c

3d

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:

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...	

< >

4a

4b Complete!

Assign Service

Assign Snapshot Service

Select Access   Complete!

Success!

4c Finish

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) Click *Finish*

****Repeat steps 6a-6b 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).

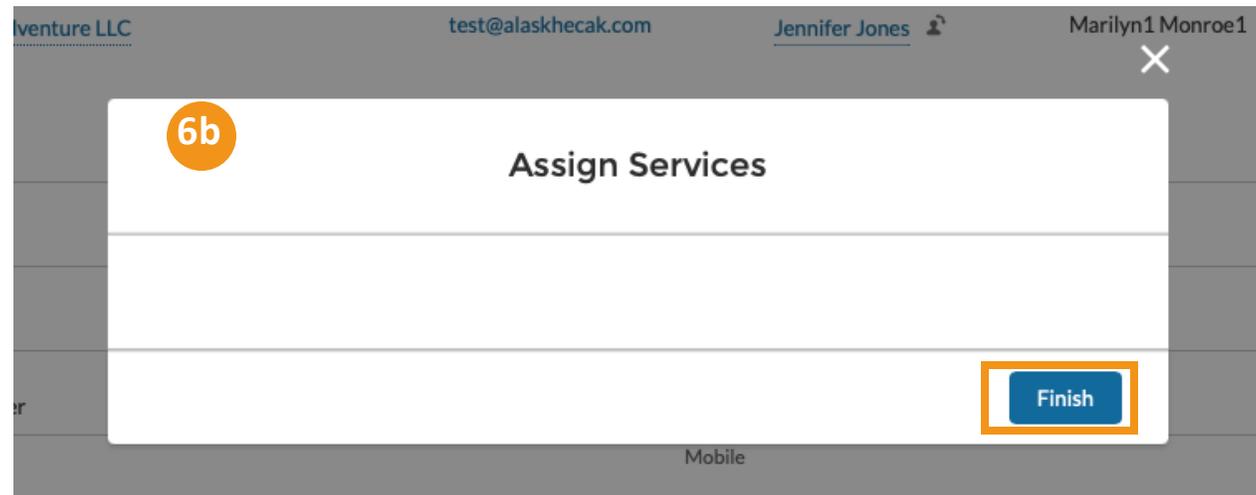
Select ONE Service below:

Snapshot
Snapshot

Encounter
Notification
System (ENS)
ENS

6a

Next



Deactivating Services

HIE Admin User Guide – Deactivating Services: Single User

1 Deactivating a service for a single User

HIE Administrators can only deactivate a service for a single user at a time

- (1a) Access the active User using the search bar at the top of any page or through the *Users* tab
- (1b) Click on the User's name
- (1c) Clicking User Services will display the current services this user has access to
- (1c) Click Service in the table which you want to deactivate to load the Service page

1a

1b

	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

1c

1d

Service	User Services	Status	Username	Activation Date
Referral Portal	Adalish Squash - Junior Smoke Test - JMH-CTO	Suspended		11/5/2022
HIE Portal	Adalish Squash - Junior Smoke Test - Portal	Suspended	alovelace1022@gmail.com	11/5/2022
Referrals	Adalish Squash - Junior Smoke Test - ReferralUI	Deactivated		11/5/2022
Prescriber Reports	Adalish Squash - Junior Smoke Test - PrescriberReports	Deactivated		11/5/2022
Clinical Information	Adalish Squash - Junior Smoke Test - InContext	Deactivated		11/5/2022

Account	Contact	Product	Status	Install Date
Interstellar LLC	Rodger25 Rabbit25	COVID-19 Lab Tools	Active	11/30/2022

Asset Name	Status
Rodger25 Rabbit25 - Interstellar LLC - COVIDLabTools	Active

Account	Contact	Product	Username
Interstellar LLC	Rodger25 Rabbit25	COVID-19 Lab Tools	

HIE Admin User Guide – Deactivating Services: Single User

2 Deactivating a service for a single User

- (2a) Click on the Status field within the details table to load a dropdown
- (2b) Change the Status within the dropdown from 'Active' to 'Deactivated'

(3) HIE Administrators can only change the status of a service from 'Active' to 'Deactivated', any other selection will result in an error.

The screenshot shows the HIE Admin Portal interface. At the top, there is a search bar and a user profile for MARILYN. Below the navigation bar, the main content area displays the details for an asset named "Rodger25 Rabbit25 - Interstellar LLC - COVIDLabTools". The status is currently "Active". An orange box highlights the "Status" field, and a callout "2a" points to it. Below the details table, a dropdown menu is shown with "Active" selected, and an orange box highlights the dropdown. A callout "2b" points to the dropdown. The dropdown options are: --None--, Pending, On Hold, Active (checked), Suspended, and Deactivated.

The screenshot shows the HIE Admin Portal interface. At the top, there is a search bar and a user profile for MARILYN. Below the navigation bar, the main content area displays the details for an asset named "Rodger25 Rabbit25 - Interstellar LLC - COVIDLabTools". The status is currently "Deactivated". An orange box highlights the "Status" field, and a callout "3" points to it. Below the details table, a dropdown menu is shown with "Active" selected, and an orange box highlights the dropdown. A callout "3" points to the dropdown. The dropdown options are: --None--, Pending, On Hold, Active (checked), Suspended, and Deactivated. A red error message box is displayed, stating: "Review the following errors: • Unable to modify status for this service, contact the HIE Technical User Support Team • You don't have permission to update status as Suspended/Pending/On Hold." The error message box has a close button (X) and a red arrow pointing to the dropdown menu. The "Save" button is highlighted in blue.

User Search



HIE Admin User Guide – User Search

1 Locating a User

Search for Users in any account you manage:

(1a) Enter User's first name, last name or email address in the search bar at the top of any page *OR*

(1b) Search by data in any column in the **Users** tab: Name, Member Title, Account Name, Email, User Status

Search for Users within the User Audit Page

(1c) Enter the User's first or last name in the search bar

1a

[HIE Admin Portal]

Search...

SEARCH

HOME ACCOUNTS **USERS** ADD USERS

Contacts
Recently Viewed ▾

25 items • Sorted by Name

Search this list...

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

HOME ACCOUNTS ASSETS ADD USERS

1b

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 User Suspended User

Active Users Approve All

Password/Activation Email Reset



HIE Portal – Password or Activation Email Reset

1 User Password or Activation Email Reset

User HIE Portal password or activation email can be reset in the HIE Admin Tool

- (1a) Search for User
- (1b) Click on User's name
- (1c) Click on *User Services* 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' and a 'SEARCH' button. Below the search bar is a navigation menu with 'HOME', 'ACCOUNTS', 'USERS', and 'ADD USERS'. The search results are displayed in a table under the heading 'Contacts'. The table has columns for NAME, MEMBER TITLE, ACCOUNT NAME, EMAIL, and PHO. The first row is highlighted with an orange box and labeled '1b'. The table also shows a 'Search Results' sidebar on the left with 'All' selected.

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	

The screenshot shows the user details page for 'Plum10 Fruit10'. The user's name is highlighted with an orange box and labeled '1c'. The page displays various fields: Title (Next Generation LLC), Account Name (Next Generation LLC), Phone, Email (plum10fruit10@lkadjflakjf.com), Contact Owner (Jennifer Jones), and Audit By (Marilyn1 Monroe1). Below the details is a 'DETAILS' section with a 'USER SERVICES' tab highlighted with an orange box and labeled '1c'. Under 'Assets (3)', there is a table with columns for Asset Name, Product Code, Status, and Primary Role. The 'View All' button at the bottom right is highlighted with an orange box and labeled '1d'.

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	

HIE Portal – Password or Activation Email Reset

(2a) Click on the blue hyperlink name in the *User* column associated with **Portal only**:
<username><account name>Portal

2 User Password or Activation Email Reset

DETAILS USER SERVICES

📁 User Services (8)			
	User	User Service	Status
1	Plum10 Fruit10 - Next Generation LLC - ConsentTool	ConsentTool	Active
2	Plum10 Fruit10 - Next Generation LLC - ConsentTool - Portal	Portal	Active
3	Plum10 Fruit10 - Next Generation LLC - Portal	Portal	Active

2a

HIE Portal – Password or Activation Email Reset

3 User Password or Activation Email Reset

(3a) Click on *HIE Portal User Management*

(3b) Click on *Reset Password* or *Resend Activation Link* from the Pop-Up Window

- The Resend Activation Link will be greyed out if a user has already activated their account

(3c) Read the instructions then click on *Confirm Reset*

The screenshot displays the HIE Portal interface for 'Plum10 Fruit10 - Next Generation LLC - Portal'. The main dashboard shows account details: Account (Next Generation LLC), Contact (Plum10 Fruit10), Product (HIE Portal), Status (Active), and Install Date (6/22/2022). Below this is a 'DETAILS' section with expandable rows for Asset Name, Account, and Product. A 'HIE Portal User Management' pop-up window is open, showing instructions for password reset and a 'Confirm Reset' button. Three callouts (3a, 3b, 3c) highlight the 'HIE Portal User Management' link, the 'Reset Password' and 'Resend Activation Link' buttons, and the 'Confirm Reset' button respectively.

3a HIE Portal User Management

3b HIE Portal User Management

3c 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.

Confirm Reset

Cancel

Editing User Details

A thick orange line that starts horizontally from the left, rises to a peak in the upper right quadrant, and then descends to a horizontal line that continues to the right edge of the slide.

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

Accounts
Recently Viewed

2 items • Updated a few seconds ago

Search this list...

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

Account
Jones Practice LLC

+ Follow New Note Audit

Phone Website Industry
Ambulatory

DETAILS PANELS SERVICES 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 USERS ADD USERS

Account Test Account + Follow New Note Audit

Phone Website Type Industry Hospital Account Owner Avideon CRISP

DETAILS PANELS SERVICES ACTIVE USERS SUSPENDED USERS

Active Users New Contact Add 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		s.alexander@randatmai

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

HOME ACCOUNTS USERS ADD USERS

Contact
Ronald Test

+ Follow **Edit** Assign Services

Title Account Name Phone (2) ▼ Email Contact Owner
Jones Practice LLC Avideon CRISP

DETAILS RELATED

Name Contact Owner
Ronald Test Avideon CRISP

Account Name Contact Type
Jones Practice LLC

Edit Contact

* Name Contact Owner
Avideon CRISP

Salutation
--None--

First Name
Ronald

Middle Name

* Last Name
Test

Suffix

Account Name Contact Type
Jones Practice LLC --None--

Reports To
Search Contacts...

Member Title

Email

Phone

Cancel Save

Bulk Export User List



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

(2) Click User Export on the top right tool bar

The screenshot displays the HIE Admin interface. At the top, a navigation bar includes 'HOME', 'ACCOUNTS', 'USERS', and 'ADD USERS'. Below this, the 'Accounts' section is titled 'Recently Viewed' and shows a list of two accounts: 'Jones Practice LLC' and 'Partlow Medical'. The 'Jones Practice LLC' account name is highlighted with an orange box and labeled '1a'. Below the list, a detailed view for 'Interstellar LLC' is shown, with the 'User Export' button highlighted by an orange box and labeled '2'. The 'User Export' button is located in a toolbar that also contains '+ Follow', 'New Note', and 'Audit' buttons. The account details for 'Interstellar LLC' include 'Website' and 'Industry: Ambulatory Medical'. At the bottom, a navigation bar includes 'DETAILS', 'ACTIVE USERS', 'SUSPENDED USERS', 'PANELS', and 'SERVICES'. The 'DETAILS' section shows 'Account Name: Interstellar LLC' and 'Account Owner: Jennifer Jones'.

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

Account: Interstellar LLC

Industry: Ambulatory Medical

Account Owner: Jennifer Jones

HIE Admin User Guide – Editing User Details

(3) Click the Export button to confirm the excel download. Note: the file will contain a full list of Active and Suspended Users

Users will show in this report if their access of HIE Portal, SES Direct, or Doc Halo is Active or Suspended. The last column 'Last Login Date' will store the last login date for the User's HIE Portal account. If the cell is blank, the user has never logged into HIE Portal. If the cell contains a date, that is the last recorded date we have that they have logged into HIE Portal. If the cell contains 'NA' they are either a SES Direct or Doc Halo user, in which case we do not currently share the last login date.

The screenshot displays the 'User Export' dialog box in the foreground, which contains the following text: "This file export will contain a full list of Active and Suspended Users with sortable headers. We are providing you with a printable snapshot of your users for the purpose of making auditing decisions." The dialog features an 'Export' button (highlighted with a red box and a circled '3') and a 'Cancel' button. An orange arrow points from the 'Export' button to the table below.

The background shows a table with the following columns: A (User Status), B (Account Name), C (FirstName), D (LastName), E (Email), F (Phone Number), G (Mobile Number), H (Member Title), I (Last Audit Date), and J (Last Login Date). The table contains 27 rows of user data.

A	B	C	D	E	F	G	H	I	J	
1	User Status	Account Name	FirstName	LastName	Email	Phone Number	Mobile Number	Member Title	Last Audit Date	Last Login Date
2	Suspended	Interstellar LLC	Green9	Grapes9	jennifer_jones@crisphealth.org			Scribe	2/2/2023	9/26/2023 12:00
3	Suspended	Interstellar LLC	dog2	gosh2	dog2gosh2@lkajdfakj2342.com			Scribe	3/2/2023	
4	Active	Interstellar LLC	dog3	gosh3	dog3gosh3@lkajdfakj2342.com			Pharmacist	3/2/2023	9/18/2023 12:00
5	Suspended	Interstellar LLC	dog5	gosh5	dog5gosh5@lkajdfakj2342.com			Scribe	3/2/2023	9/21/2023 12:00
6	Suspended	Interstellar LLC	dog16	gosh16	dog16gosh16@lkajdfakj2342.com			Scribe	1/23/2023	
7	Suspended	Interstellar LLC	dog17	gosh17	dog17gosh17@lkajdfakj2342.com			Scribe	1/23/2023	
8	Suspended	Interstellar LLC	dog21	gosh21	dog21gosh21@lkajdfakj2342.com			Scribe	1/23/2023	
9	Suspended	Interstellar LLC	dog22	gosh22	dog22gosh22@lkajdfakj2342.com			Scribe	1/23/2023	
10	Suspended	Interstellar LLC	dog23	gosh23	dog23gosh23@lkajdfakj2342.com			Scribe	1/23/2023	
11	Suspended	Interstellar LLC	dog24	gosh24	dog24gosh24@lkajdfakj2342.com			Scribe	1/18/2023	
12	Suspended	Interstellar LLC	dog25	gosh25	dog25gosh25@lkajdfakj2342.com			Scribe	1/24/2023	
13	Suspended	Interstellar LLC	dog28	gosh28	dog28gosh28@lkajdfakj2342.com			Scribe	2/1/2023	
14	Suspended	Interstellar LLC	dog29	gosh29	dog29gosh29@lkajdfakj2342.com			Scribe	2/2/2023	
15	Suspended	Interstellar LLC	dog41	gosh41	dog41gosh41@lkajdfakj2342.com			Physician	1/18/2023	
16	Active	Interstellar LLC	dog43	gosh43	dog43gosh43@lkajdfakj2342.com			Physician	9/8/2023	
17	Suspended	Interstellar LLC	dog50	gosh50	doggoshedit1251@gmail.com	8977890789		Physician, Resident	2/2/2023	
18	Active	Interstellar LLC	dog67	gosh67	dog67gosh67@lkajdfakj2342.com			OCME Investigator	9/8/2023	NA
19	Suspended	Interstellar LLC	dog100	gosh100	dog100gosh100@lkajdfakj2342.com			Physician	1/25/2023	
20	Suspended	Interstellar LLC	Napoleon7	Dynamite7	napoleon7dynamite7@ldajfka93289284.com			Medical Assistant	2/2/2023	
21	Suspended	Interstellar LLC	Napoleon9	Dynamite9	napoleon9dynamite9@ldajfka93289284.com			Nursing Home Administrator	2/2/2023	
22	Suspended	Interstellar LLC	Napoleon10	Dynamite10	napoleon10dynamite10@ldajfka93289284.com			Nursing Home Other Staff	2/2/2023	
23	Suspended	Interstellar LLC	Napoleon12	Dynamite12	napoleon12dynamite12@ldajfka93289284.com			Other Non-Licensed Staff	2/2/2023	
24	Suspended	Interstellar LLC	Napoleon16	Dynamite16	napoleon16dynamite16@ldajfka93289284.com			Pharmacy Technician	2/2/2023	
25	Suspended	Interstellar LLC	Napoleon22	Dynamite22	napoleon22dynamite22@ldajfka93289284.com			Public Health Personnel	2/2/2023	
26	Suspended	Interstellar LLC	Napoleon24	Dynamite24	napoleon24dynamite24@ldajfka93289284.com			Registered Nurse	2/2/2023	
27	Suspended	Interstellar LLC	Napoleon2	Dynamite2	napoleon2dynamite2@ldajfka93289284.com			Certified Nurse Midwife	2/2/2023	
					napoleon19dynamite19@ldajfka93289284.com					

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.