HIE Admin User Guide

Getting Started

The Health Information Exchange (HIE) Admin Portal allows HIE Administrators to manage their colleagues' HIE accounts. Account creation, access to specific CRISP 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 Portal.

HIE SUPPORT SERVICES

CRISP MD:
P: 877.952.7477
E: support@crisphealth.org

CRISP DC:
P: 833-580-4646
E: support@crisphealth.org

WVHIN:
P: 866.468.5755
E: wvhinsupport@crisphealth.org

Connie:
P: 866.987.5514
E: help@conniect.org

Updated April 25, 2021

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Accessing the Portal

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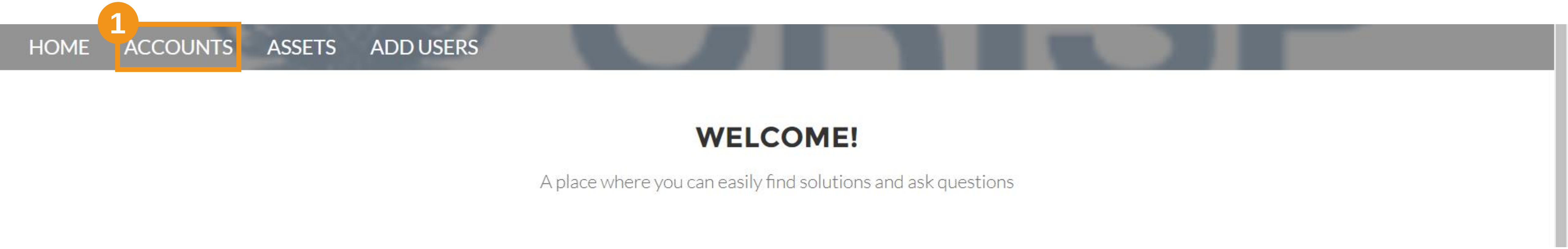
HIE Admin User Guide – Accessing the Portal

1 Logging In

Log on to https://crisphealth.force.com/UserAdmin?expid=CRISP to access the HIE Admin Portal.

If this is your first time accessing the Portal, you are required to create a username, password, and set up two-factor authentication on your account. Enter your login credentials in the fields provided.

After logging in, you will see the screen below. First, let's Verify your users. Select the Accounts tab to begin.



Managing Existing Users

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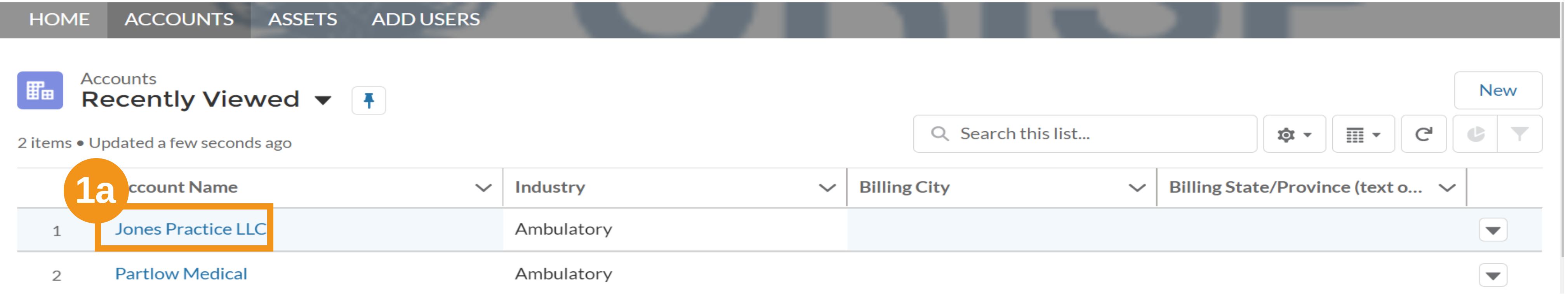
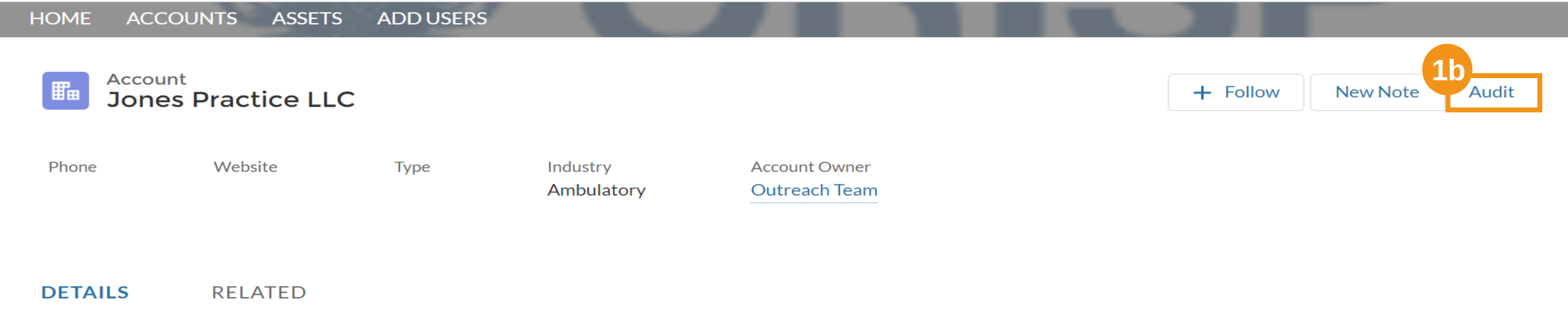
HIE Admin User Guide – Managing Existing Users

1 Choosing an Account

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

(1b) Select “*Audit*” in the top-right of your screen.





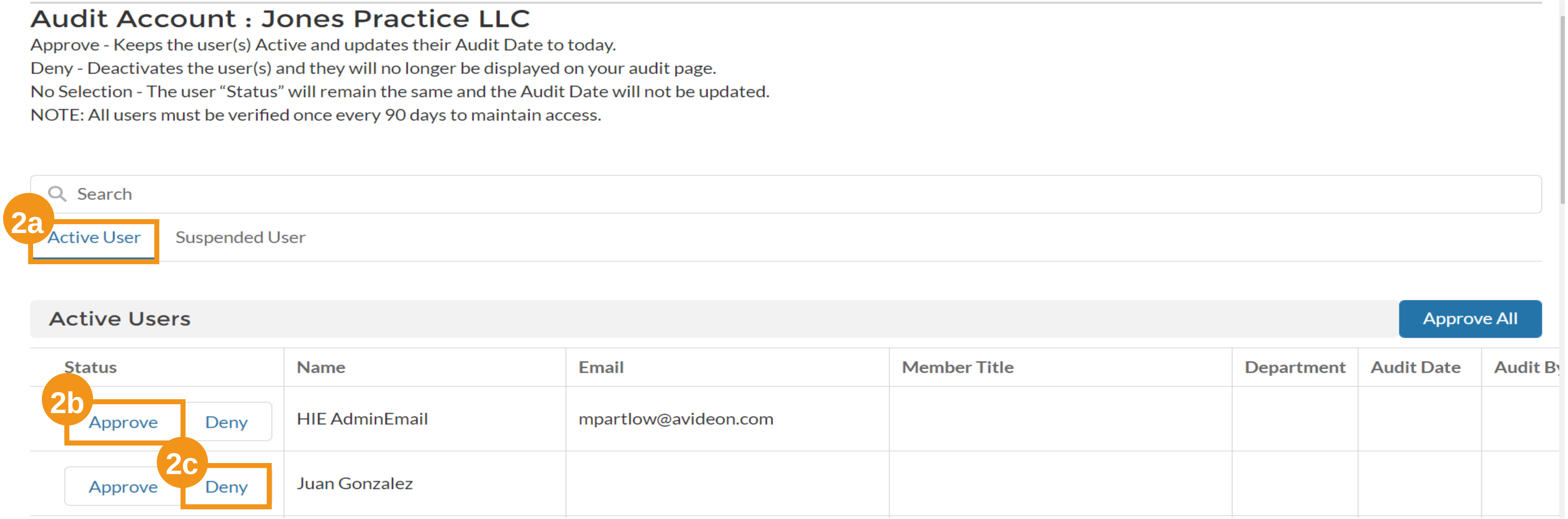
HIE Admin User Guide – Managing Existing Users

2 Managing Active Users

(2a) To work with Active Users, ensure the Active Users 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 all" on the right side of the screen.

(2c) Select "Deny" to revoke access for individuals who are no longer employees within your organization.



HIE Admin User Guide – Managing Existing Users

3 Managing Suspended Users

(3a) If *Suspended Users* are present, select the appropriate indicator to *Approve* or *Deny* the user.

(3b) If *Approved*, the user will be *Reactivated*.

(3c) At this point, select *Next* to review your selections. After clicking *Next,* proceed to the next page.

Active User Suspended User

Suspended Users

Approve All

Status	Name	Email	Member Title	Department	Audit Date	Audit By
3a 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 3b 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 Next Cancel

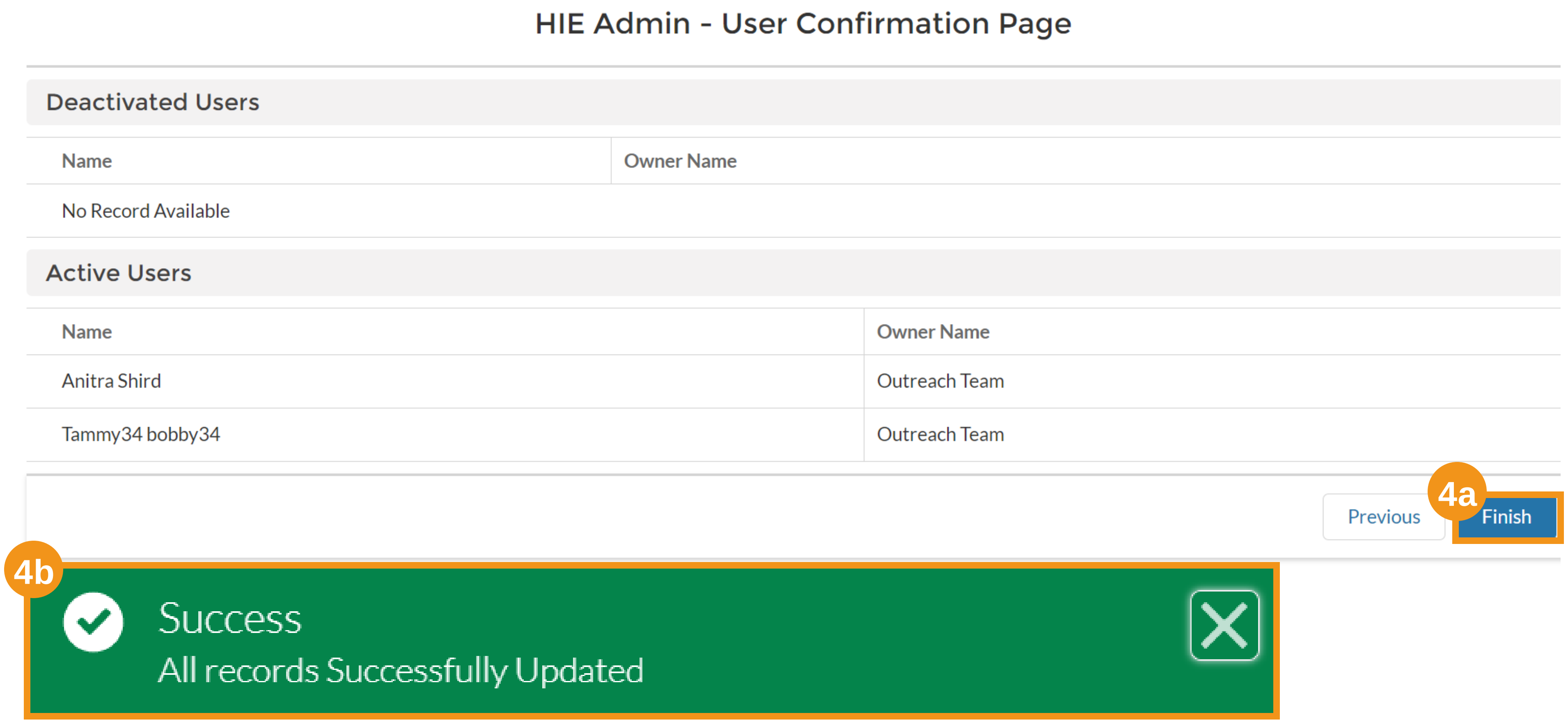
HIE Admin User Guide – Managing Existing Users

4 Confirming an Audit

(4a) If *Suspended Users* are present, select the appropriate indicator to *Approve* or *Deny* the user.

(4b) Upon clicking *Finish*, you will see the following prompt:

You have successfully managed your users.



Adding Individual Users

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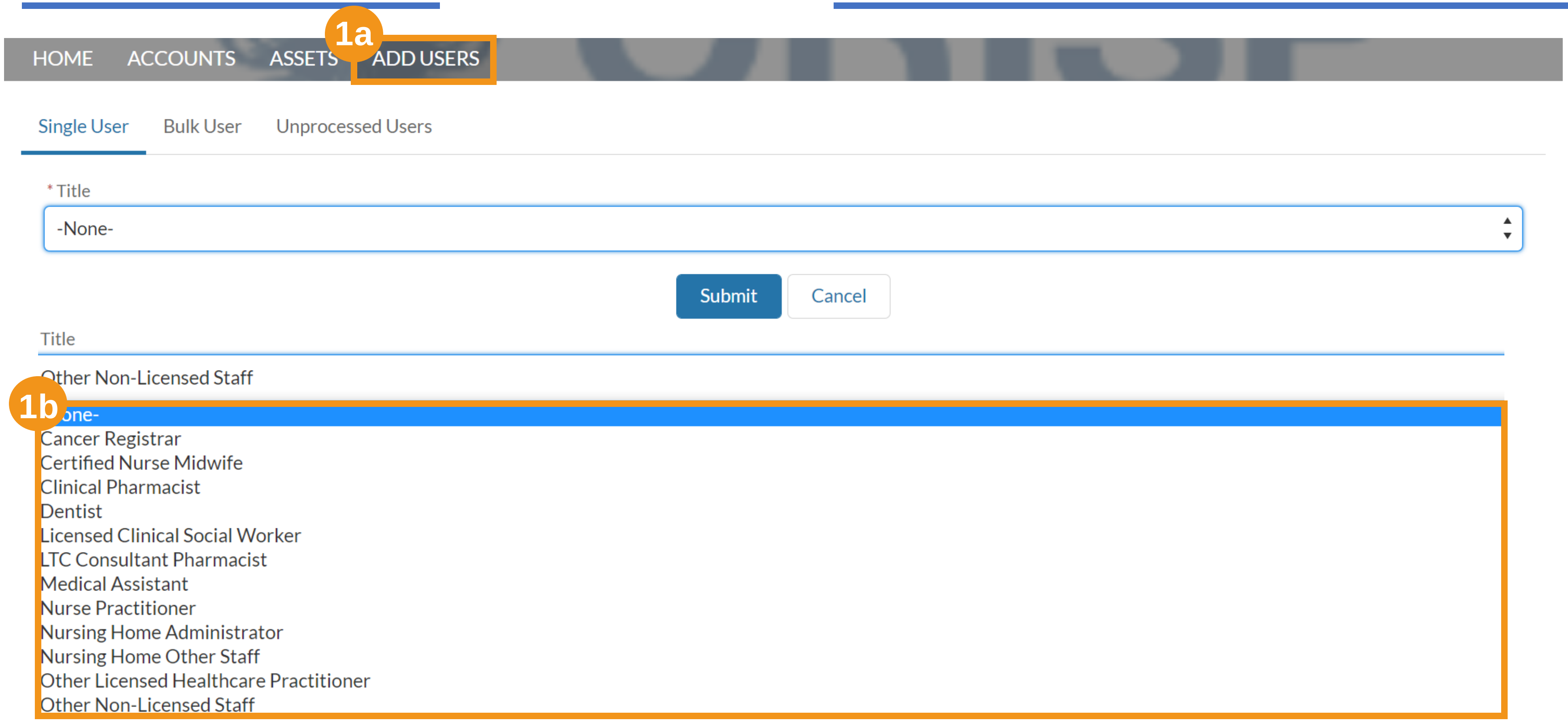
HIE Admin User Guide – Adding Individual Users

1 Selecting a Title

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

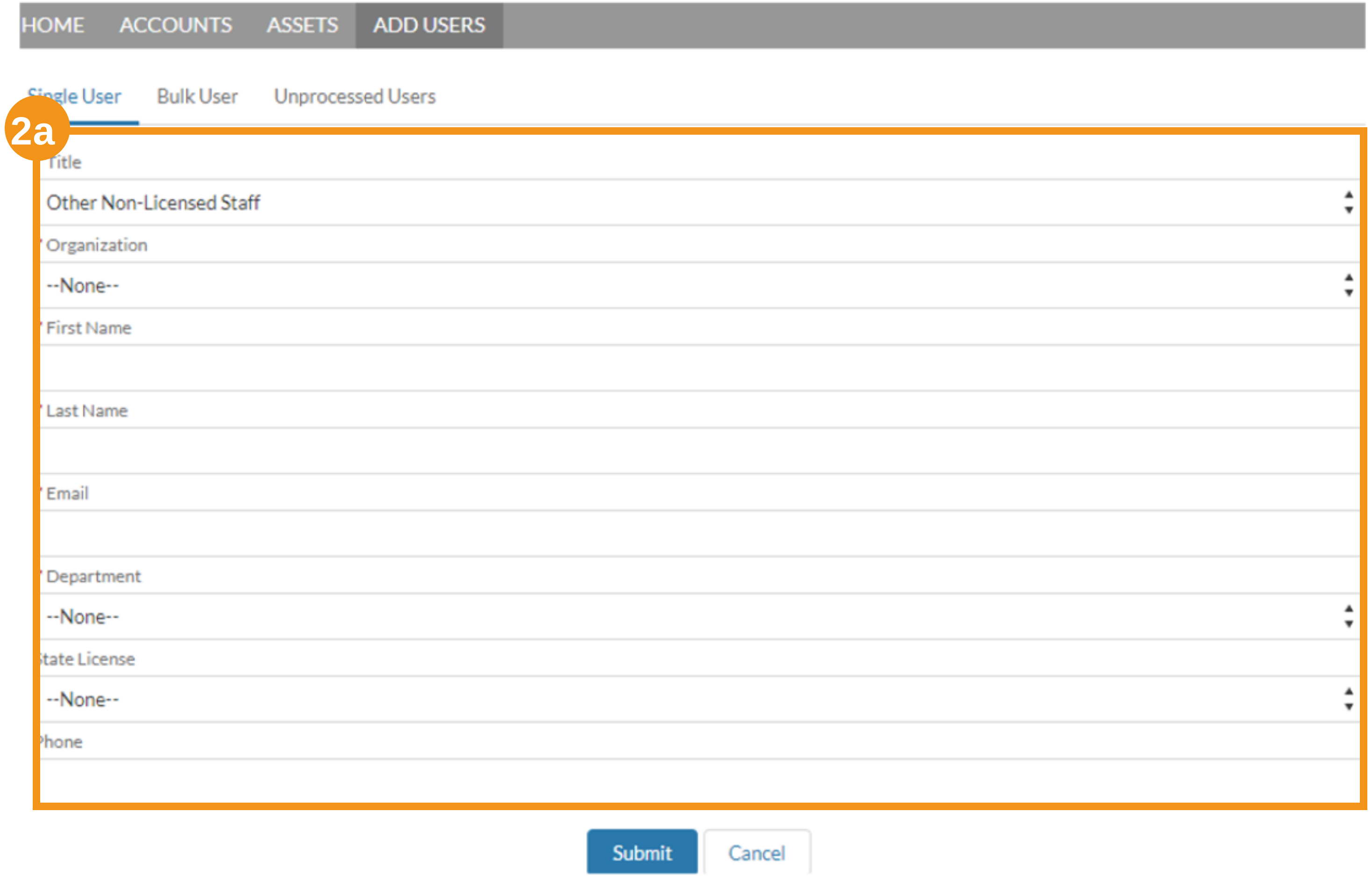
(1b) Select an appropriate *Title* for the new user. A list will appear in the dropdown.



HIE Admin User Guide – Adding Individual Users

2 Creating a New User

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



If you are credentialing a new provider with any of the following member titles, you are required to select a "PDMP Specialty" for that provider:

Physician, Nurse Practitioner, Physician Assistant, Dentist, Podiatrist, Certified Nurse Midwife

Exception: If a Physician Intern or Physician resident have an Organizational DEA and Suffix, the Organizational CDS and the professional license number are not required.

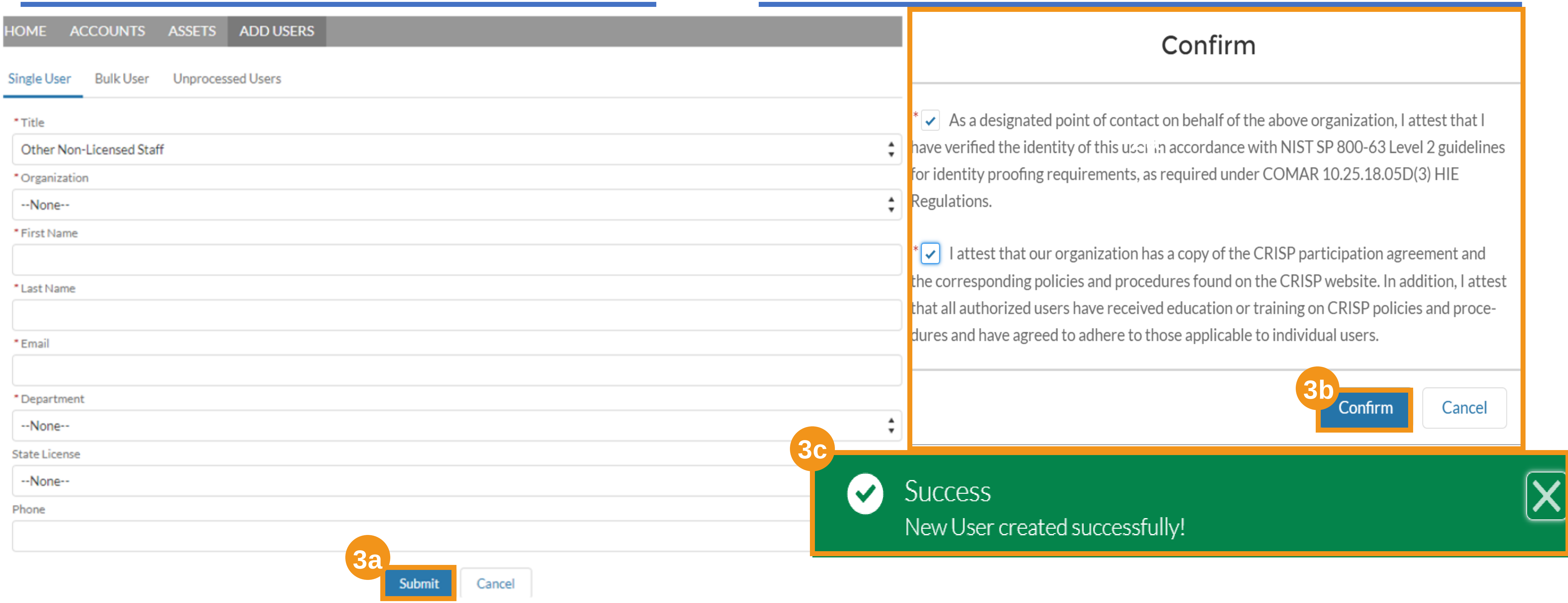
HIE Admin User Guide – Adding Individual Users

3 Submitting a New User & Attestation

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

(3b) Once you've completed the onboarding form, 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.



Adding Multiple Users

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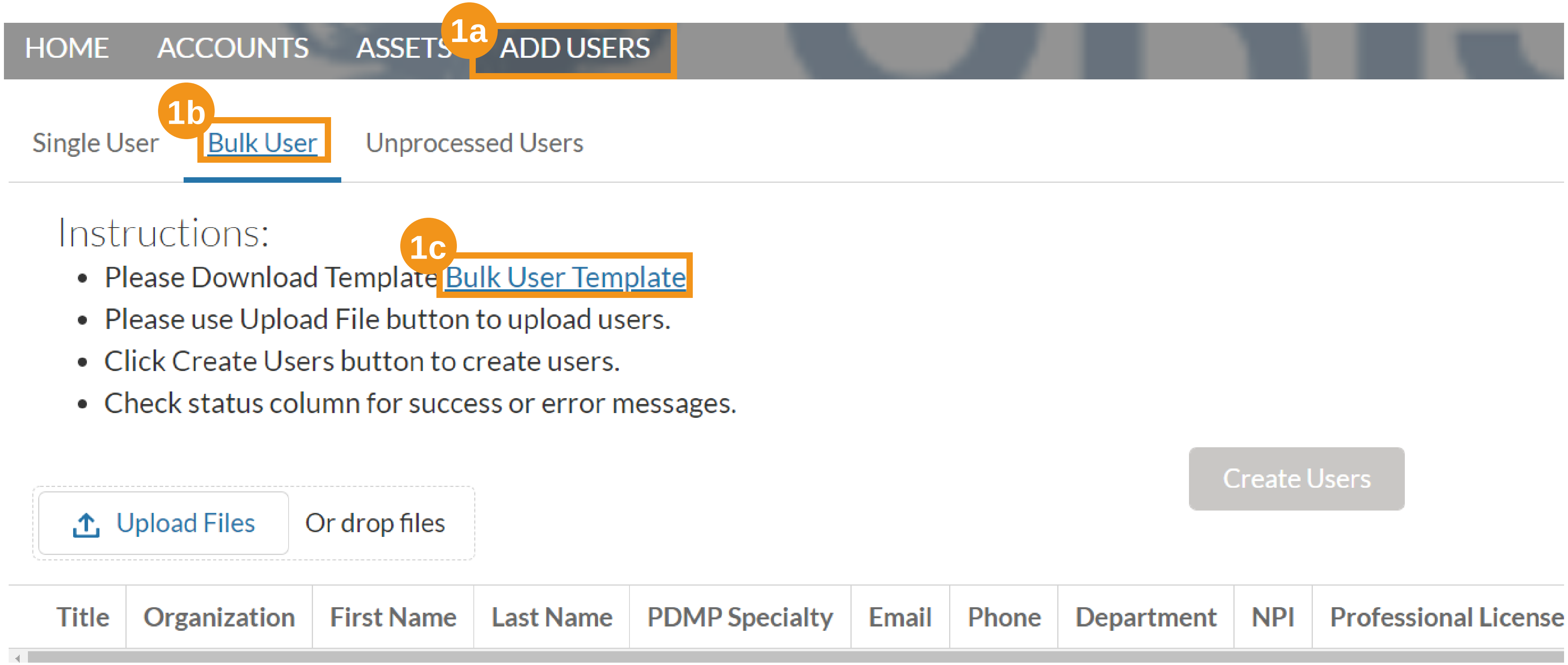
HIE Admin User Guide – Adding Multiple Users

1 1. Preparing the *Bulk Upload* Form

(1a) Click the "Add User" button at the top of the home screen.

(1b) Click the "Bulk Users" tab.

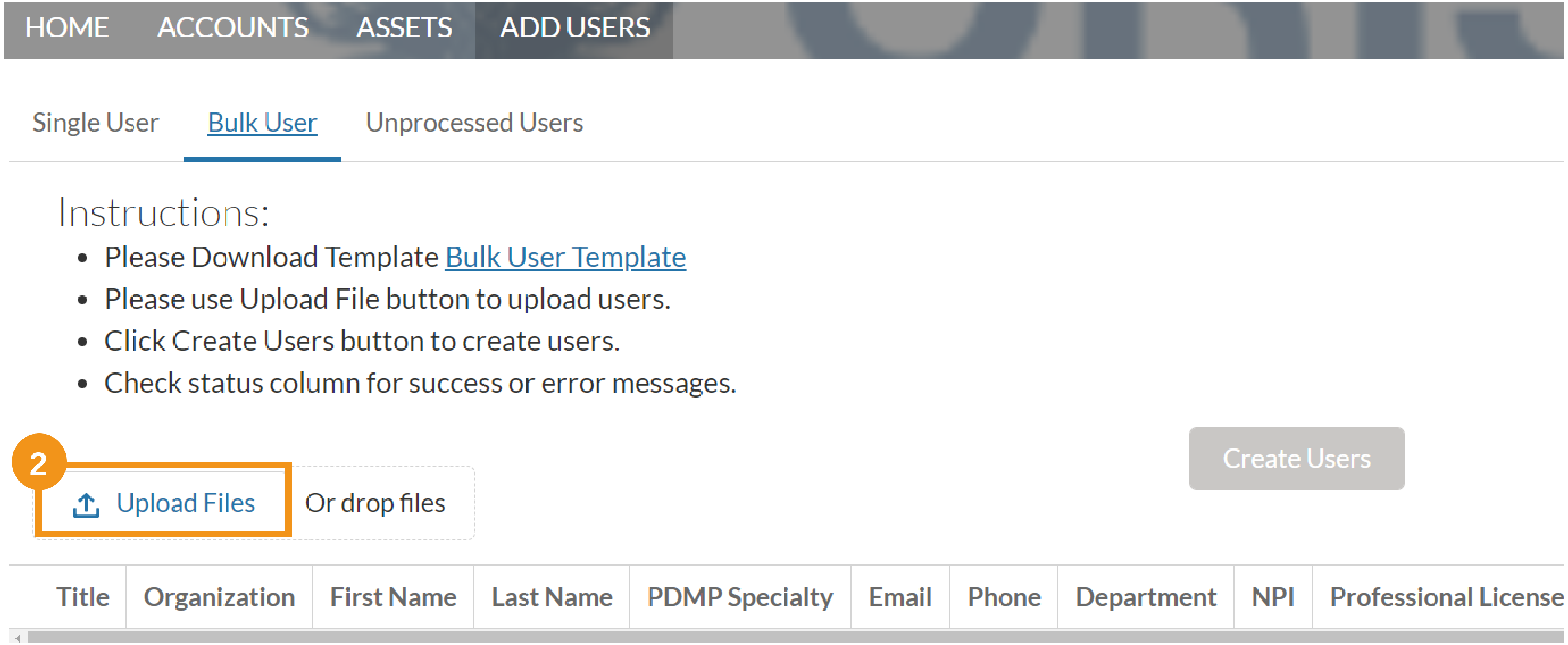
(1c) Click the hyperlink within the "Instructions" section. Download, complete, and save as a .csv file prior to beginning the Bulk Upload process.



HIE Admin User Guide – Adding Multiple Users

2 Uploading Files

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



HIE Admin User Guide – Adding Multiple Users

3 Creating Users

(3) Select “Create Users” to import your list into the HIE database.

Potential Upload Errors
If the system identifies errors within your file, the Users with errors will be highlighted red and an explanation will be provided. All successfully uploaded Users will be highlighted in green.

Unsuccessful records will be moved to the “*Unprocessed Users*” tab so they can be updated later with the required information to create a User.

Single User | Bulk User | Unprocessed Users

Instructions:
- Please Download Template Bulk User Template
- Please use Upload File button to upload users.
- Click Create Users button to create users.
- Check status column for success or error messages.

3 Create Users

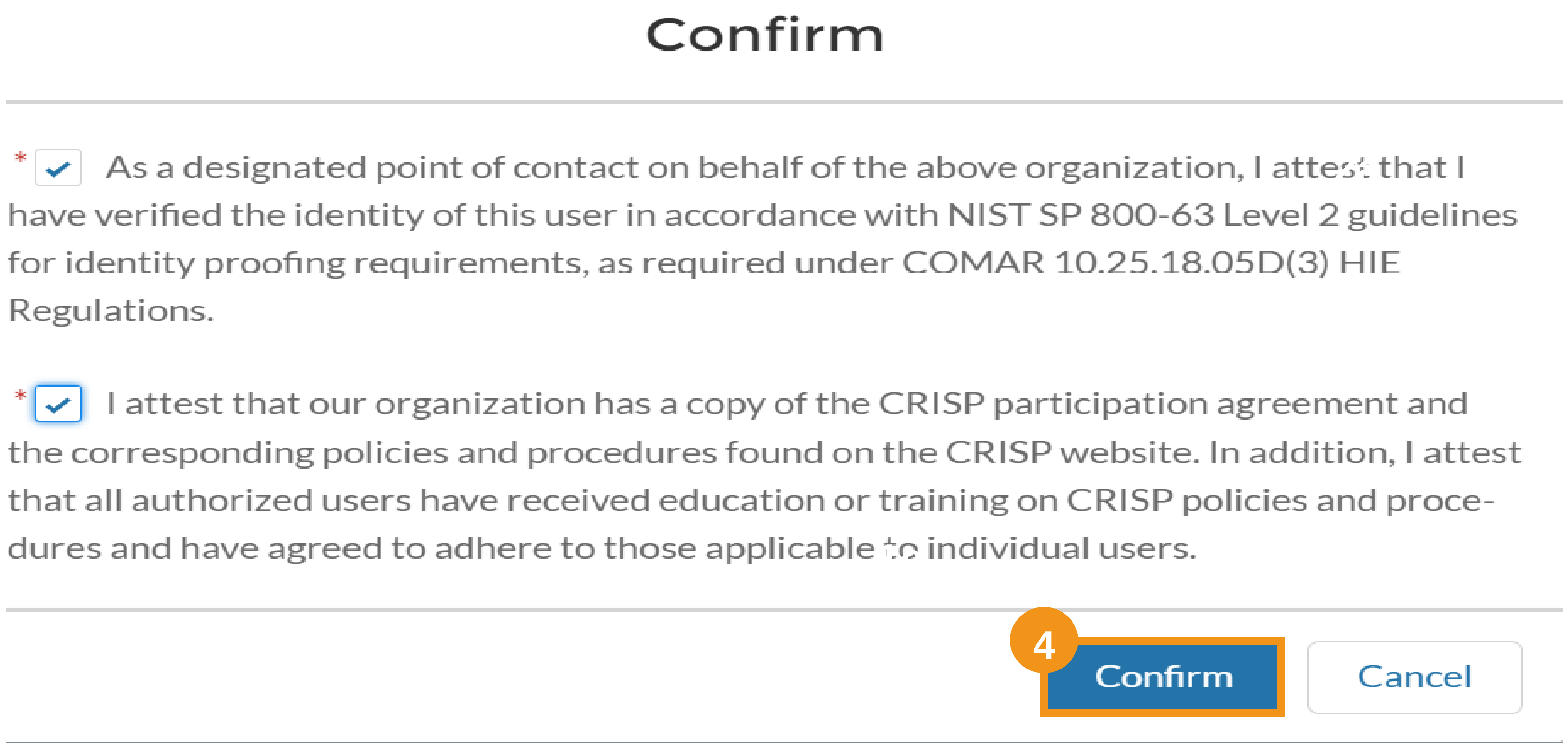
Upload Files | Or drop files

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 **Attestation**

(4) Once the file has successfully loaded, a confirmation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click "*Confirm*".



HIE Admin User Guide – Adding Multiple Users

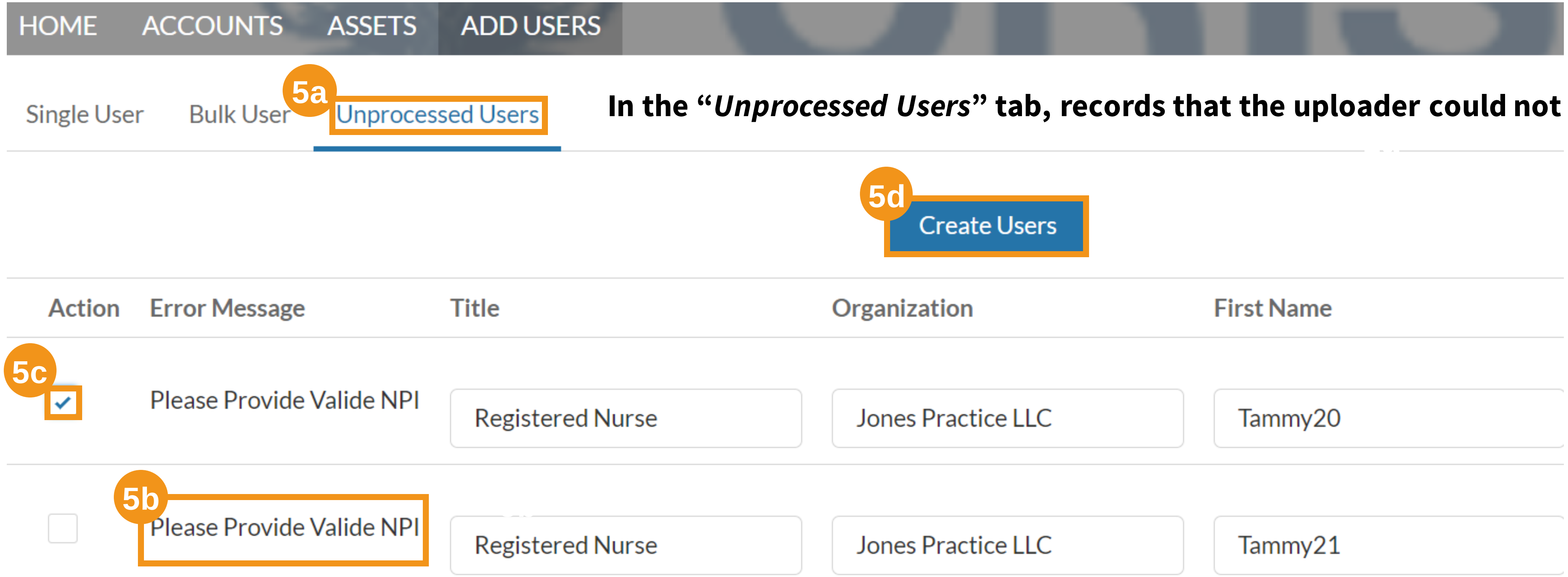
5 Managing Unprocessed Users

(5a) in the “Add Users” tab, select *Unprocessed Users*.

(5b) Update the missing or incorrect information.

(5c) Check the box next to the record in the “*Action*” column and

(5d) Select “*Create Users*”.



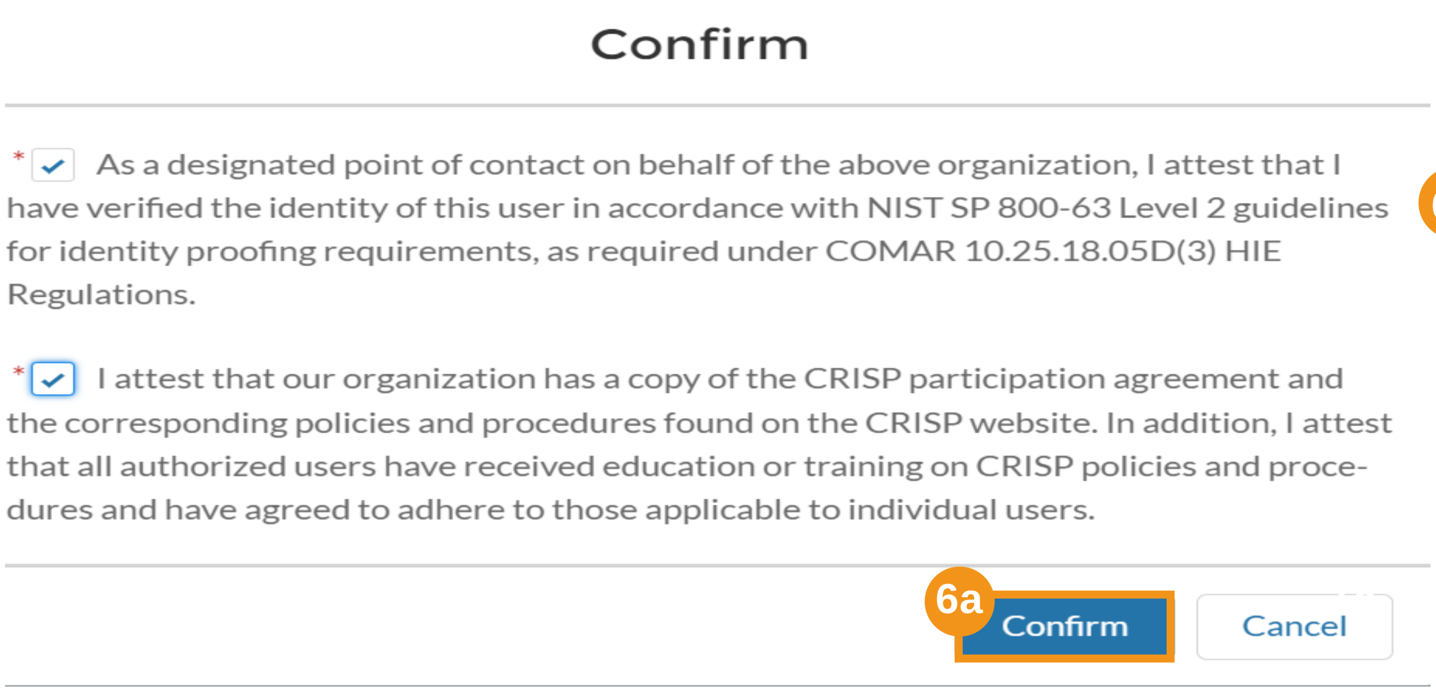
In the “*Unprocessed Users*” tab, records that the uploader could not process are listed.

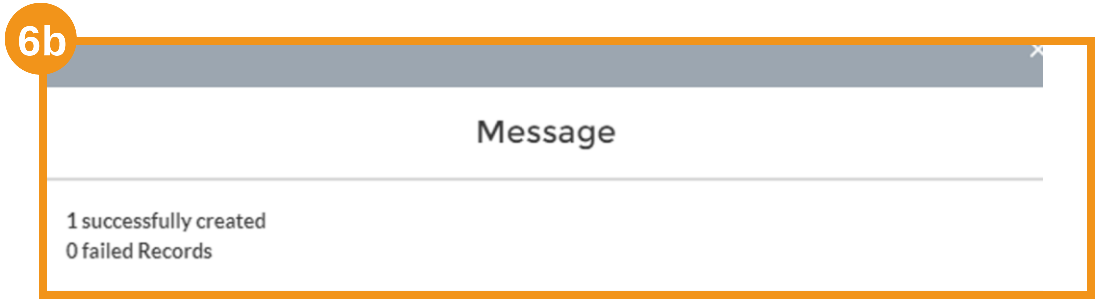
HIE Admin User Guide – Adding Individual Users

6 Submitting Updated Users & Attestation

(6a) Once you've completed the onboarding form, an attestation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click "*Confirm*".

(6b) A pop up window will show the number of Users created and the number of failed records.





User Search

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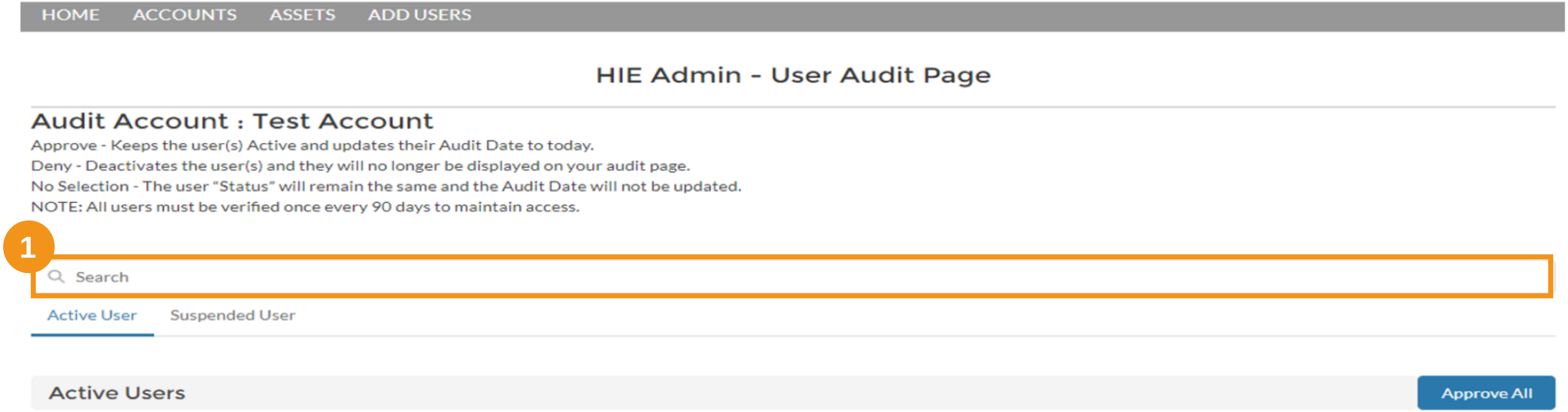
HIE Admin User Guide – User Search

1 Locating a User

(1) Enter the User's full name in the search bar on the HIE Admin Portal.



Editing User Details

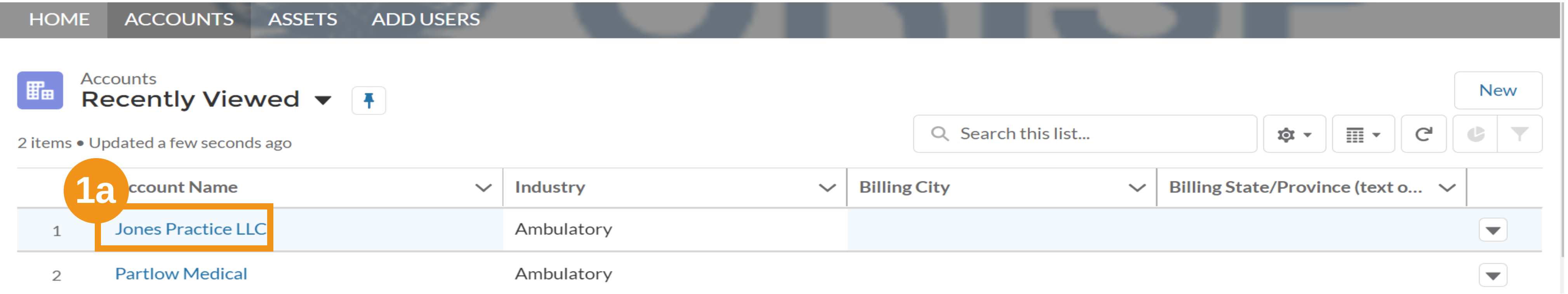
Updated April 25, 2021

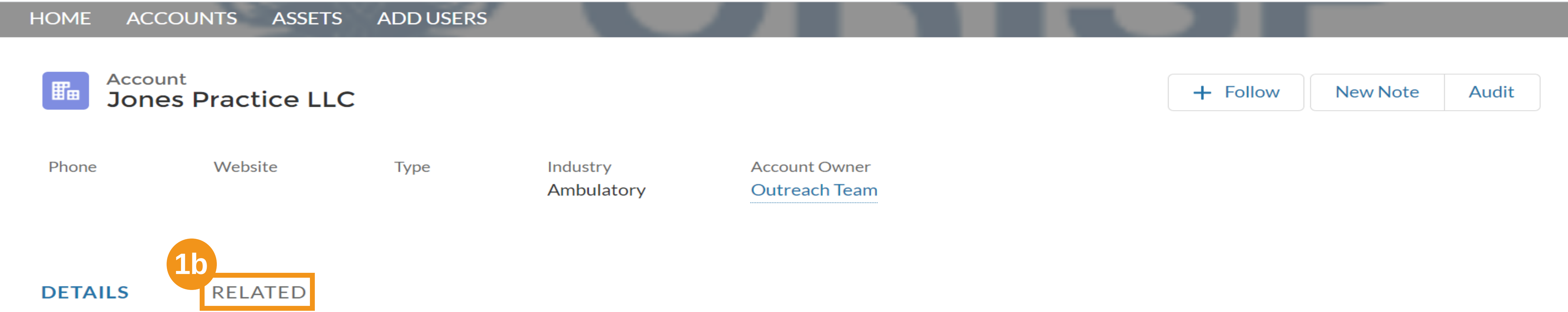
HIE Admin User Guide – Managing Existing Users

1 Choosing an Account

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

(1b) Select "*Related*" to view users listed with the Account.



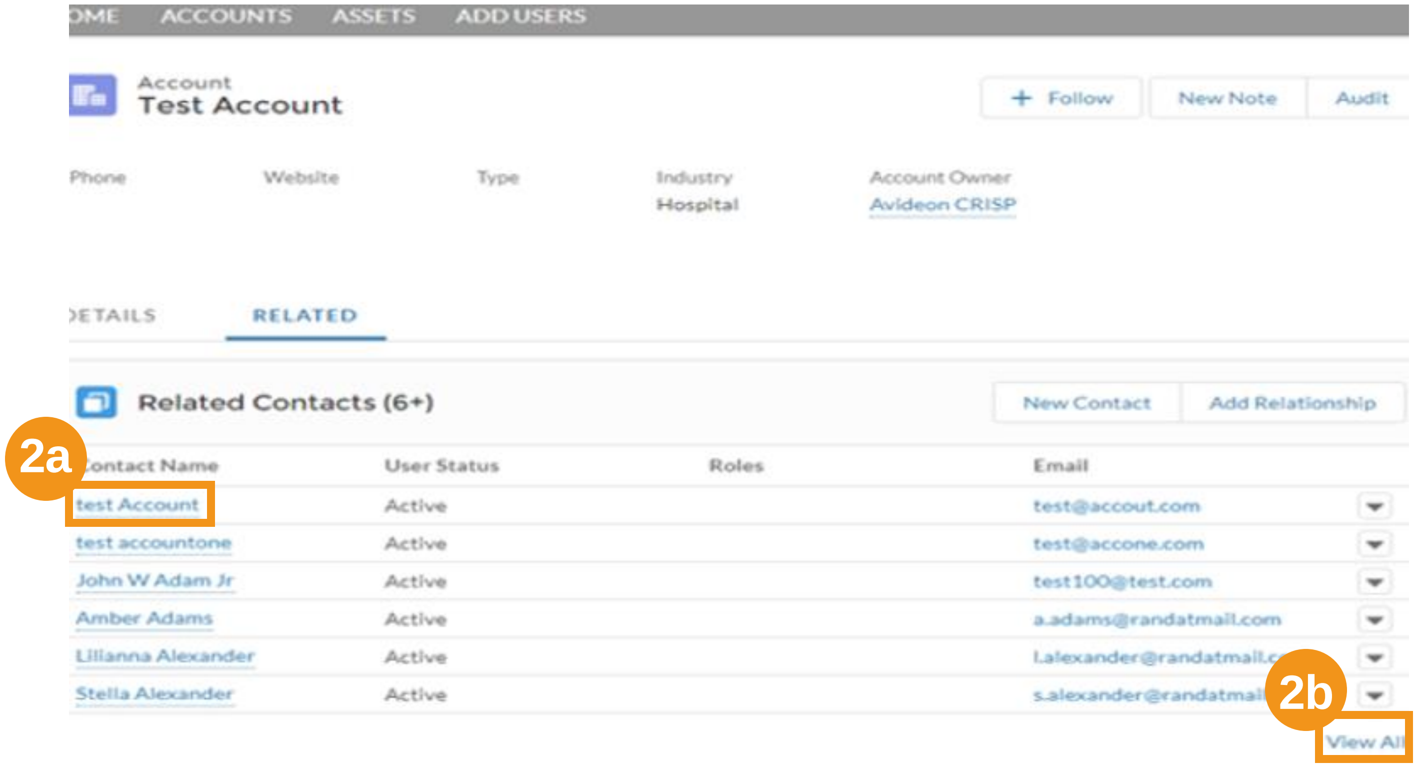


HIE Admin User Guide – Managing Existing Users

2 Viewing and Selecting a Contact

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

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

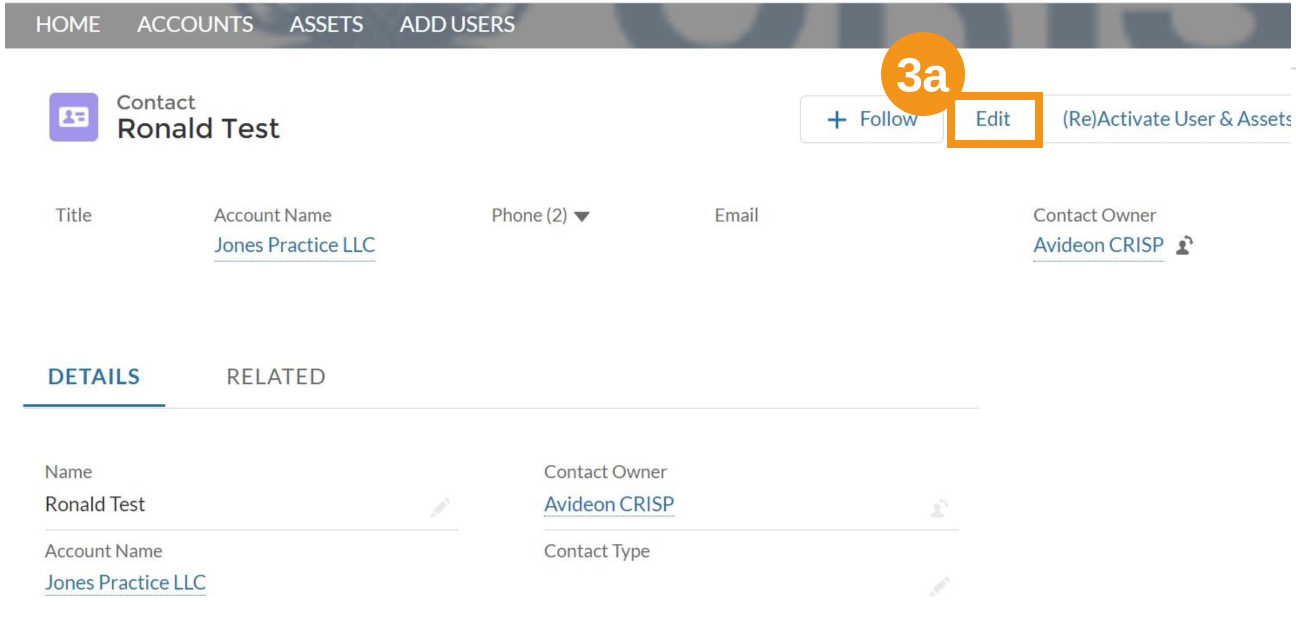


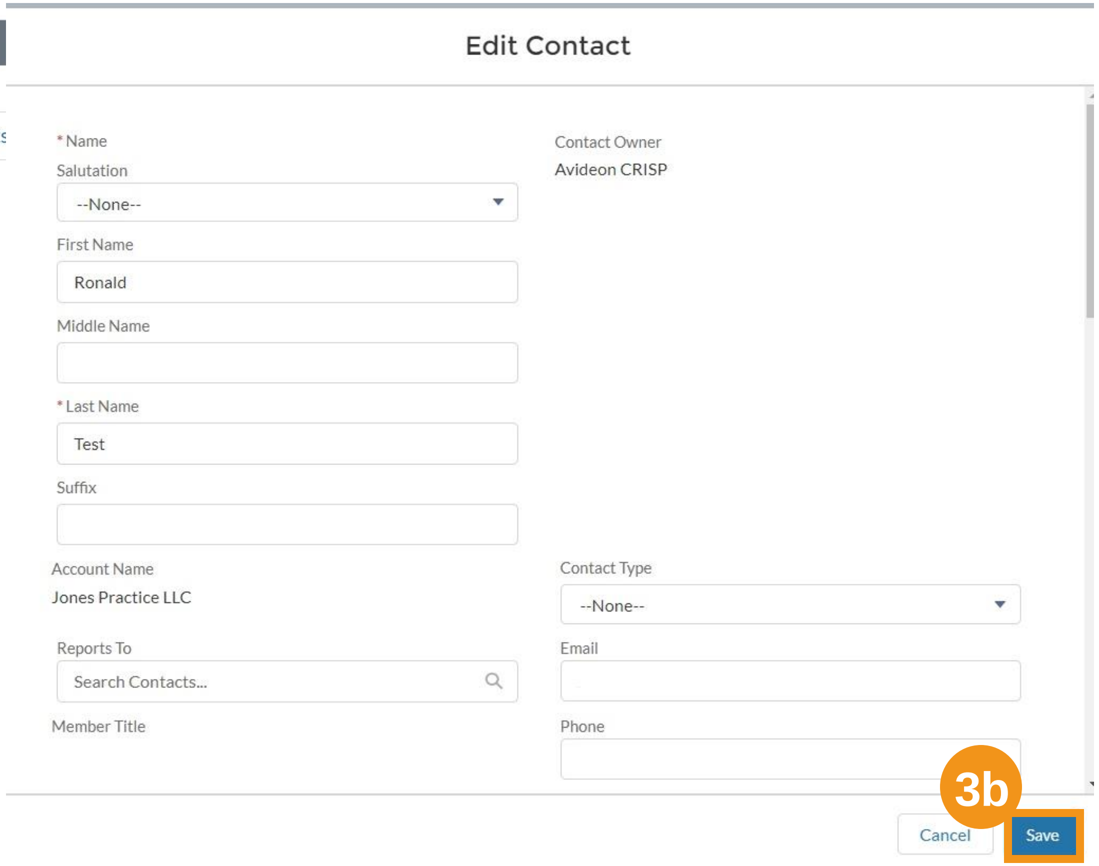
HIE Admin User Guide – Managing Existing Users

3 Editing and Saving a Contact

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

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





Glossary

Updated April 25, 2021

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 and reduce the total cost of care.

HIE Administrator: An authorized, organizational representative who can credential and remove Contacts from their organization.

Account: An organization in Salesforce. Some HIE Administrators have access to multiple Accounts within their larger organization.

Audit: The process of verifying, denying, and adding Contacts.

Contact: A User who has been created within Salesforce.

Related Contacts: A list of Contacts who are associated with a particular Account.

Active User: A Contact who has access to HIE Tools, like ULP, CRS, ENS, or other tools.

Suspended User: A Contact whose access to HIE Tools has lapsed due to inactivity, inappropriate use, or a change of employment.