

# 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](mailto:support@crisphealth.org)

### CRISP DC:

P: 833-580-4646

E: [support@crisphealth.org](mailto:support@crisphealth.org)

### WVHIN:

P: 866.468.5755

E: [wvhinsupport@crisphealth.org](mailto:wvhinsupport@crisphealth.org)

### Connie:

P: 866.987.5514

E: [help@conniect.org](mailto:help@conniect.org)

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# Accessing the Portal



# HIE Admin User Guide – Accessing the Portal

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## 1 Logging In

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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.

---

HOME **1** ACCOUNTS ASSETS ADD USERS

**WELCOME!**

A place where you can easily find solutions and ask questions

# Managing Existing Users



# 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.

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 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 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.

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

# 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
<b>3a</b> 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 <b>3b</b> 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.

### 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



# Adding Individual Users

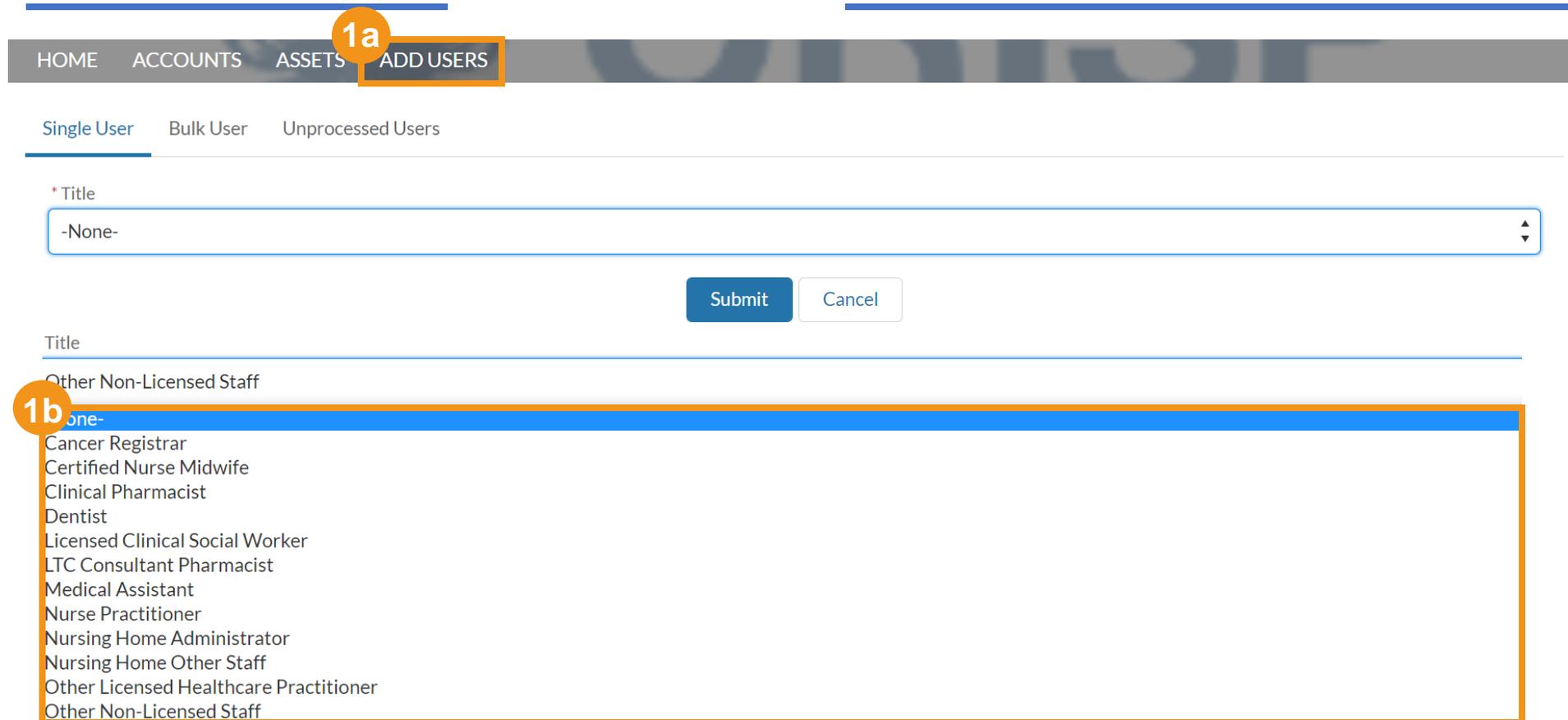


# HIE Admin User Guide – Adding Individual Users

## 1 Selecting a Title

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

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



The screenshot displays the HIE Admin User Guide interface. At the top, a navigation bar contains the following tabs: HOME, ACCOUNTS, ASSETS, and ADD USERS. The ADD USERS tab is highlighted with an orange box and labeled '1a'. Below the navigation bar, there are three sub-tabs: Single User, Bulk User, and Unprocessed Users. The Single User tab is selected. Below the sub-tabs, there is a form with a dropdown menu labeled '\* Title' and a '-None-' option. Below the dropdown menu, there are two buttons: Submit and Cancel. Below the Submit and Cancel buttons, there is a list of titles. The list is labeled 'Title' and contains the following items: 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, and Other Non-Licensed Staff. The list is highlighted with an orange box and labeled '1b'.

HOME ACCOUNTS ASSETS ADD USERS

Single User Bulk User Unprocessed Users

\* Title

-None-

Submit Cancel

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 form. Keep in mind that all fields marked with asterisks \* are required.

HOME ACCOUNTS ASSETS ADD USERS

Single User Bulk User Unprocessed Users

2a

Title  
Other Non-Licensed Staff

Organization  
--None--

\* First Name

Last Name

Email

\* Department  
--None--

\* State License  
--None--

Phone

Submit Cancel

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.

The screenshot displays the 'ADD USERS' interface. At the top, a navigation bar includes 'HOME', 'ACCOUNTS', 'ASSETS', and 'ADD USERS'. Below this, there are tabs for 'Single User', 'Bulk User', and 'Unprocessed Users'. The form contains several fields: 'Title' (dropdown menu with 'Other Non-Licensed Staff' selected), 'Organization' (dropdown menu with '--None--' selected), 'First Name' (text input), 'Last Name' (text input), 'Email' (text input), 'Department' (dropdown menu with '--None--' selected), 'State License' (dropdown menu with '--None--' selected), and 'Phone' (text input). 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 point of contact on behalf of the above organization, I attest that I have verified the identity of this user in accordance with NIST SP 800-63 Level 2 guidelines for identity proofing requirements, as required under COMAR 10.25.18.05D(3) HIE Regulations.' and 'I attest that our organization has a copy of the CRISP participation agreement and the corresponding policies and procedures found on the CRISP website. In addition, I attest that all authorized users have received education or training on CRISP policies and procedures and have agreed to adhere to those applicable to individual users.' At the bottom of the dialog are 'Confirm' and 'Cancel' buttons. A callout '3b' points to the 'Confirm' button.

At the bottom right, 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.

# Adding Multiple Users



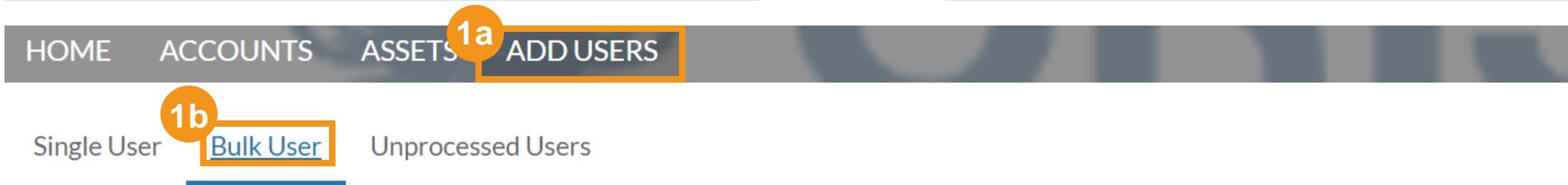
# HIE Admin User Guide – Adding Multiple Users

## 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.



### 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.



Title	Organization	First Name	Last Name	PDMP Specialty	Email	Phone	Department	NPI	Professional License
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# 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.

HOME ACCOUNTS ASSETS **ADD USERS**

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.

2

 Upload Files Or drop files

Create Users

Title	Organization	First Name	Last Name	PDMP Specialty	Email	Phone	Department	NPI	Professional License
-------	--------------	------------	-----------	----------------	-------	-------	------------	-----	----------------------

# HIE Admin User Guide – Adding Multiple Users

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

## 3 Creating Users

### 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.

Upload Files Or drop files

3

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

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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*”.

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### Confirm

\*  As a designated point of contact on behalf of the above organization, I attest that I have verified the identity of this user in accordance with NIST SP 800-63 Level 2 guidelines for identity proofing requirements, as required under COMAR 10.25.18.05D(3) HIE Regulations.

\*  I attest that our organization has a copy of the CRISP participation agreement and the corresponding policies and procedures found on the CRISP website. In addition, I attest that all authorized users have received education or training on CRISP policies and procedures and have agreed to adhere to those applicable to individual users.

---

4

Confirm

Cancel

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# 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”.

HOME ACCOUNTS ASSETS ADD USERS

Single User Bulk User **5a** Unprocessed Users **In the “Unprocessed Users” tab, records that the uploader could not process are listed.**

**5d** Create Users

Action	Error Message	Title	Organization	First Name
<b>5c</b> <input checked="" type="checkbox"/>	Please Provide Valide NPI	Registered Nurse	Jones Practice LLC	Tammy20
<input type="checkbox"/>	<b>5b</b> Please Provide Valide NPI	Registered Nurse	Jones Practice LLC	Tammy21

# 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.

### Confirm

\*  As a designated point of contact on behalf of the above organization, I attest that I have verified the identity of this user in accordance with NIST SP 800-63 Level 2 guidelines for identity proofing requirements, as required under COMAR 10.25.18.05D(3) HIE Regulations.

\*  I attest that our organization has a copy of the CRISP participation agreement and the corresponding policies and procedures found on the CRISP website. In addition, I attest that all authorized users have received education or training on CRISP policies and procedures and have agreed to adhere to those applicable to individual users.

6a

Confirm

Cancel

6b

#### Message

1 successfully created  
0 failed Records

# User Search



# 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.

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.

1

Search

Active User Suspended User

Active Users

Approve All

# Editing User Details



# 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.

HOME ACCOUNTS ASSETS ADD USERS

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		

HOME ACCOUNTS ASSETS ADD 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 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.

The screenshot displays the HIE Admin User Guide interface. At the top, there is a navigation bar with links for HOME, ACCOUNTS, ASSETS, and ADD USERS. Below this, the main content area shows the details for an account named "Test Account". The account information includes fields for Phone, Website, Type, Industry (Hospital), and Account Owner (Avideon CRISP). There are three buttons: "+ Follow", "New Note", and "Audit".

Below the account details, there are two tabs: "DETAILS" and "RELATED". The "RELATED" tab is selected, showing a section titled "Related Contacts (6+)". This section includes two buttons: "New Contact" and "Add Relationship". Below the buttons is a table with the following columns: Contact Name, User Status, Roles, and Email. The table lists six contacts, with the first one, "test Account", highlighted by a red box and labeled "2a". The "View All" link at the bottom right of the table is also highlighted by a red box and labeled "2b".

Contact Name	User Status	Roles	Email
<b>test Account</b>	Active		test@accout.com
<a href="#">test accountone</a>	Active		test@accone.com
<a href="#">John W Adam Jr</a>	Active		test100@test.com
<a href="#">Amber Adams</a>	Active		a.adams@randatmail.com
<a href="#">Lillanna Alexander</a>	Active		lalexander@randatmail.c
<a href="#">Stella Alexander</a>	Active		s.alexander@randatmai

# 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.

The screenshot displays the HIE Admin User Guide interface. At the top, a navigation bar includes 'HOME', 'ACCOUNTS', 'ASSETS', and 'ADD USERS'. The main content area shows a contact profile for 'Ronald Test' with fields for Title, Account Name (Jones Practice LLC), Phone (2), Email, and Contact Owner (Avideon CRISP). A '3a' callout highlights the 'Edit' button in the top right of the contact profile. Below the profile, a 'DETAILS' section shows the contact's name and account name with edit icons. On the right, a modal window titled 'Edit Contact' is open, containing form fields for Name (Salutation, First Name, Middle Name, Last Name, Suffix), Account Name, Reports To, Member Title, Contact Owner, Contact Type, Email, and Phone. A '3b' callout highlights the 'Save' button at the bottom right of the modal. The 'Cancel' button is also visible next to it.

HOME ACCOUNTS ASSETS ADD USERS

Contact  
Ronald Test

+ Follow Edit (Re)Activate User & Assets

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 Salutation Contact Owner  
--None-- Avideon CRISP

First Name  
Ronald

Middle Name

\* Last Name  
Test

Suffix

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

Reports To Email  
Search Contacts...

Member Title Phone

Cancel Save

# Glossary



# HIE Admin User Guide – Glossary

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**Health Information Exchange (HIE)**: An integrated network connecting Hospitals, Primary Care Practices, and Public Health Entities. HIE provides users with access to patients' medical records at the point of care and analytics to improve public health 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.