

HIE Admin Tool

November 2024



● Session Overview

- Session is being recorded. The slide deck & the recording will be distributed to attendees
- Audio lines are muted to avoid distractions during our presentation. Please use the zoom chat box to type in questions. We will have time for a Q&A at the end.
- HIE Admin Tool Training Materials can be found on our website:
 - <https://www.crisphealth.org/learning-system/hie-admin-tool/>





HIE Admin Tool Overview

• Tool Overview

- 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. Users can do the following in the tool:



- 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 HIE Admin Tool



Connecting Providers with Technology to Improve Patient Care

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MY HIE ADMIN(S)

SEND FEEDBACK

PRODUCT UPDATES

KEVIN PHILLIP

LOGOUT

HOME

Search Applications & Reports



This query portal is for authorized use only. By using this system, all users acknowledge notice of, and agree to comply with, CRISP MD's Participation Agreement ("PA") and CRISP MD Policies and Procedures. Click here to review the policies and procedure. CRISP MD uses a privacy monitoring tool to ensure all users are adherent to an approved policy or use case. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use.

Q Patient Search

First Name * Last Name *

Date of Birth * Gender

SSN

Search Results

First Name	Last Name	Date of Birth	Gender	Address	Match Score
No records found					

Population Explorer

View Panel
DC Demo Panel 1 (DC_CEND_DEMO1)

MALONE_DEMO, MARGARET	DOB: 1942-06-01
Encounter Type: Outpatient	Gender: Female
Event Time: 2024-02-29 14:56	
MALONE_DEMO, MARGARET	DOB: 1942-06-01
Encounter Type: Outpatient	Gender: Female
Event Time: 2024-02-29 14:56	
GROVE_DEMO, YVETTE	DOB: 1935-06-01
Encounter Type: Inpatient	Gender: Female
Event Time: 2024-02-29 09:14	
GROVE_DEMO, YVETTE	DOB: 1935-06-01
Encounter Type: Inpatient	Gender: Female
Event Time: 2024-02-29 09:14	

Your Dashboard

For applications requiring patient context, please start by using the Patient Search interface above.

HIE Admin Tool

CRISP Role Manager

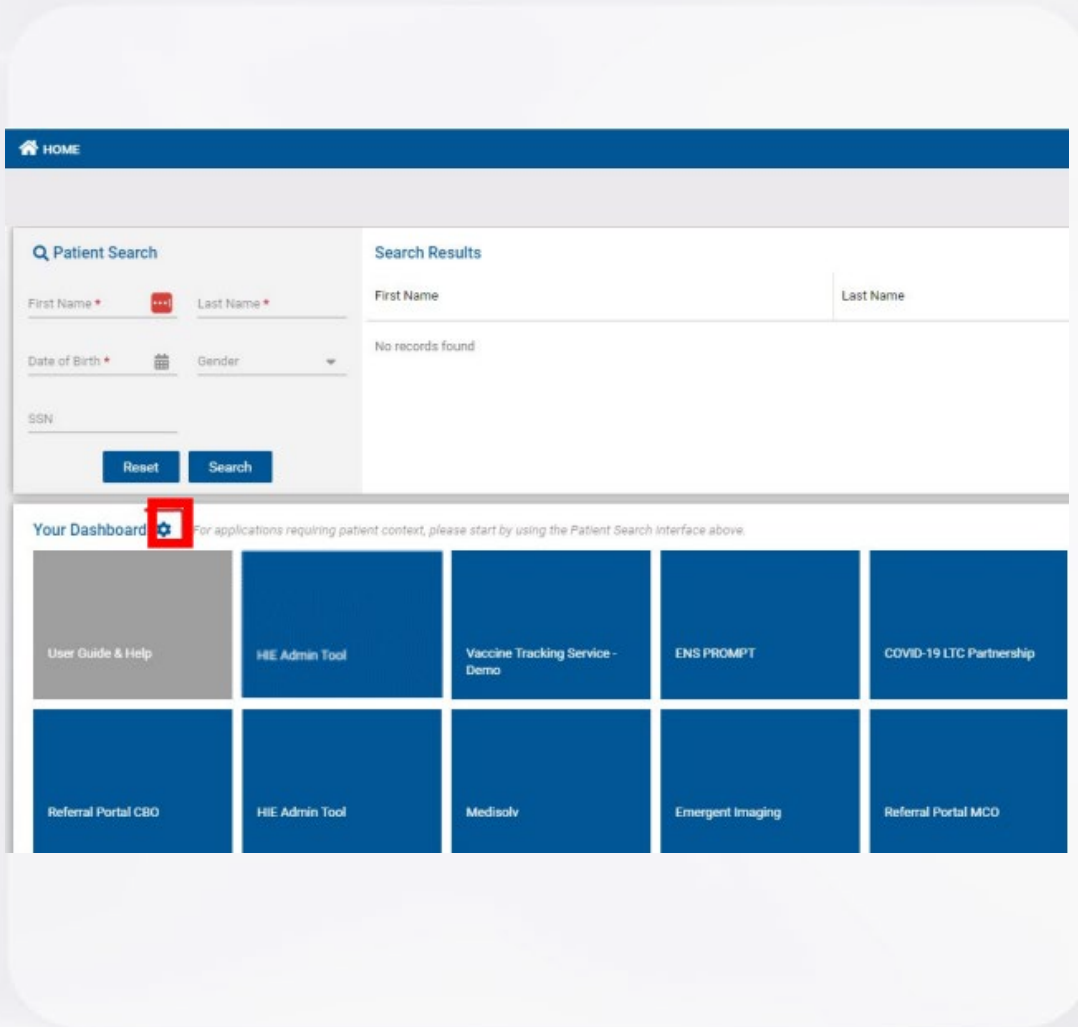
Reports

Medisolv

2023 eCQMs Development



Tile Customization



HOME


Q Patient Search

First Name * Last Name *
Date of Birth * Gender
SSN

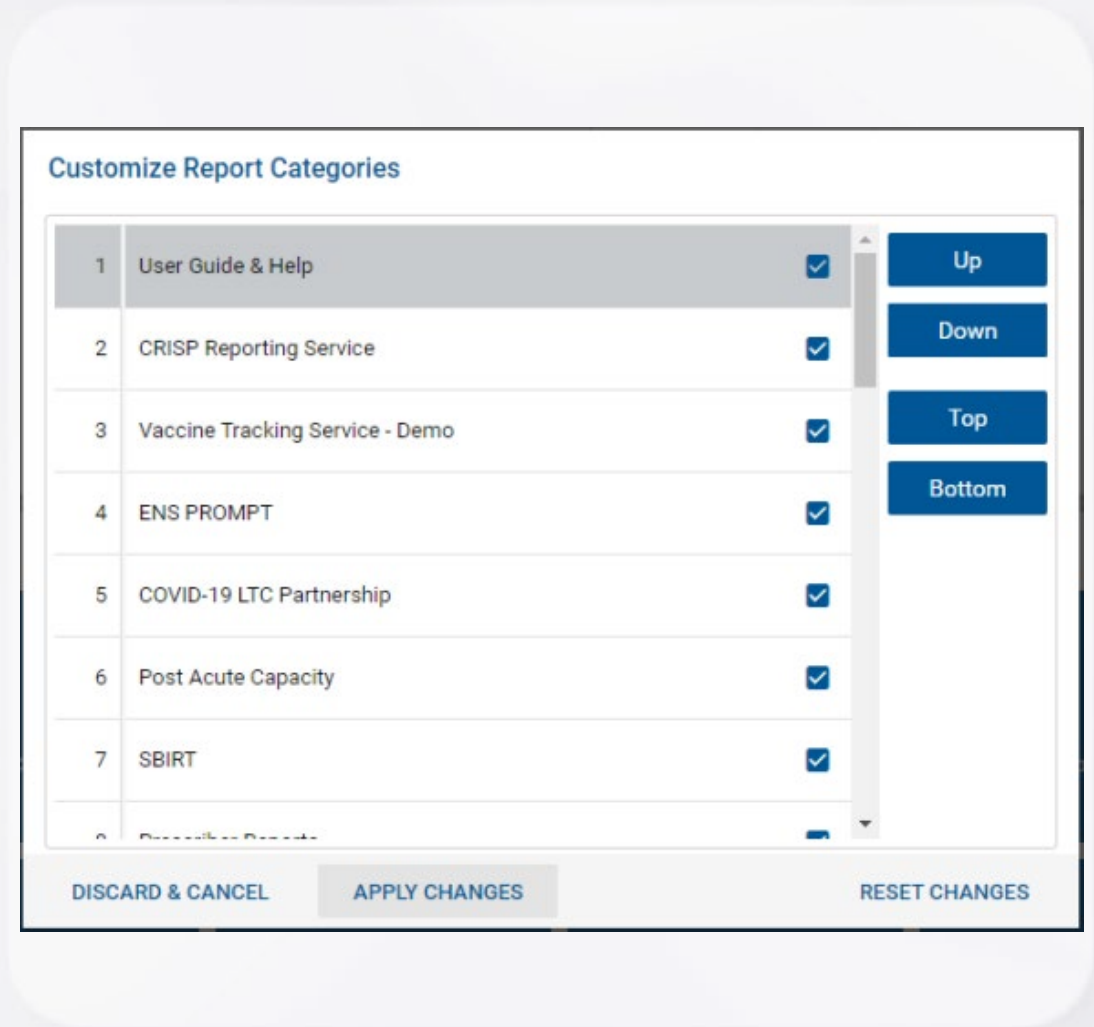
Reset Search

Search Results

First Name Last Name
No records found

Your Dashboard  For applications requiring patient context, please start by using the Patient Search interface above.

User Guide & Help	HIE Admin Tool	Vaccine Tracking Service - Demo	ENS PROMPT	COVID-19 LTC Partnership
Referral Portal CBO	HIE Admin Tool	Medisolv	Emergent Imaging	Referral Portal MCO



Customize Report Categories

1	User Guide & Help	<input checked="" type="checkbox"/>	Up
2	CRISP Reporting Service	<input checked="" type="checkbox"/>	Down
3	Vaccine Tracking Service - Demo	<input checked="" type="checkbox"/>	Top
4	ENS PROMPT	<input checked="" type="checkbox"/>	Bottom
5	COVID-19 LTC Partnership	<input checked="" type="checkbox"/>	
6	Post Acute Capacity	<input checked="" type="checkbox"/>	
7	SBIRT	<input checked="" type="checkbox"/>	
8	Specialty Reports	<input checked="" type="checkbox"/>	

DISCARD & CANCEL APPLY CHANGES RESET CHANGES

• HIE Admin Tool Home Page



WELCOME!

User Verification Process

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. For questions, support, or troubleshooting issues, please contact the Customer Care Team for your region:

MD/DC at 1.877.952.7477 or support@crisphealth.org

WVHIN at 1.844.468.5755 or wvhinsupport@crisphealth.org

Connie at 1.866.987.5514 or help@conniect.org

healthConnect Alaska at 1.907.770.2626 or support@ak-ehealth.org

To verify your users, click on the Account tab above, find the organization for which you are auditing users, navigate to that page, and press the Audit button in the upper right corner of the screen.





Managing Existing Users

● Managing Existing Users

- Every 90 days, HIE Administrators are required to verify each HIE user within their organization.
- To help protect your patients and their health information, please use this platform to review whether members of your organization should continue accessing HIE resources. If an HIE user is not verified within the 90-day period, their access to HIE tools will be suspended.

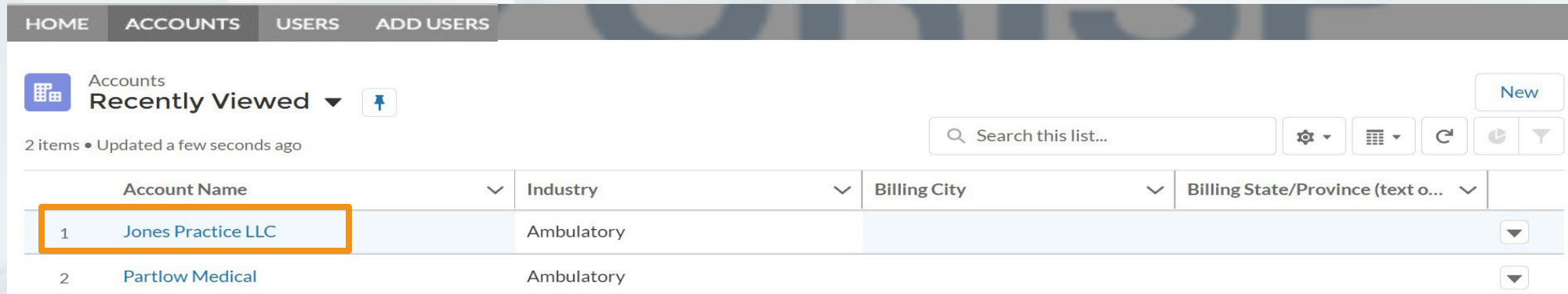


● Managing Existing Users


- **Active Users** – A user who has access to HIE tools
- **Suspended Users** – A user whose access to HIE Tools has lapsed due lack of HIE Admin auditing every 90 days.
- **Deactivated Users** – A user whose access to HIE Tools has lapsed due to inactivity, inappropriate use, or changes to employment. Re-activation of these users can only be done by CRISP Staff when HIE Admins contact them for assistance.
- The Next slides document how to preform a user Audit








1. In the Accounts tab, choose the Account you would like to audit by clicking on the Account Name



HOME ACCOUNTS USERS ADD USERS

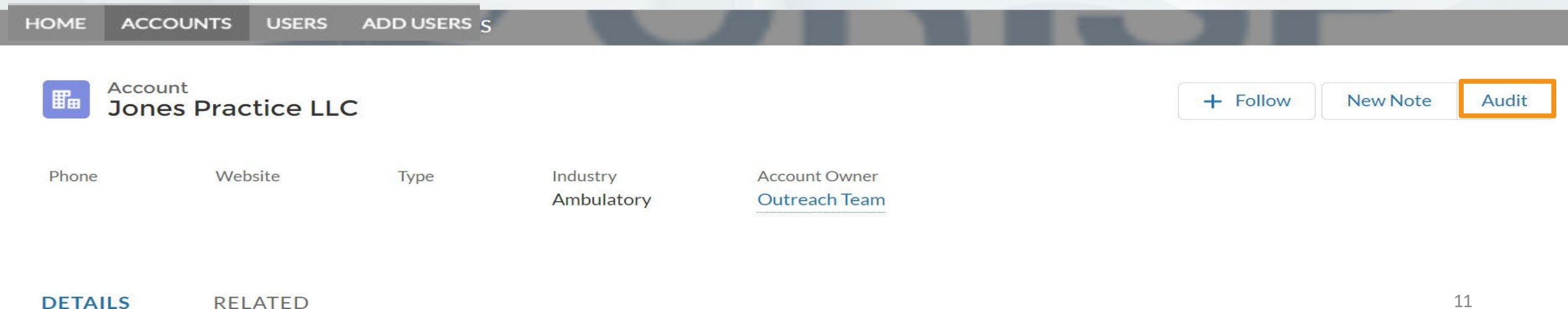
Accounts
Recently Viewed ▼ 

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		▼

2. Select *Audit* in the top-right of your screen



HOME ACCOUNTS USERS ADD USERS

Account
Jones Practice LLC

[+ Follow](#) [New Note](#) [Audit](#)

Phone Website Type Industry Account Owner

Ambulatory [Outreach Team](#)

DETAILS RELATED

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

Active User

Suspended User

Active Users

Approve All

Status	Name	Email	Member Title	Department	Audit Date	Audit By
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	HIE AdminEmail	mpartlow@avideon.com				
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	Juan Gonzalez					

Approve Current Page

Complete Audit

Cancel

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.



2

Active User

[Suspended User](#)

Suspended Users

Approve All

Status	Name	Email	Member Title	Department	Audit Date	Audit By
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	Laughter Ajibade	laughter@test.com	Nurse Practitioner		2021-03-16	2021-03-16
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	Peter Shay	shay@test.com	Physician, Intern		2021-03-17	2021-03-17
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	Test Thu1	testthu1@test.com	Dentist		2021-03-17	2021-03-17
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	Nick Redfurn	nick@test.com			2021-03-18	2021-03-18
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	test singleuser	test@sunuser.com	Dentist		2021-03-18	2021-03-18

Complete Audit

Cancel

Confirmation Page



2

HIE Admin - User Confirmation Page

Deactivated Users

Name	Email
sherlock sherlock	holmes52@asdadas.com

Active Users

Name	Email
pencil2 eraser2	pencil2eraser2@gkjdsafd.com

Previous

Finish



Success

All records Successfully Updated





Adding New Users

• Adding Users

HOME ACCOUNTS USERS **ADD USERS**

Single User

Bulk User

*Title

-None-

Complete this field.

Submit

Cancel

✓ -None-

Cancer Registrar

Certified Nurse Midwife

Clinical Pharmacist

Dentist

Licensed Clinical Social Worker

LTC Consultant Pharmacist

Medical Assistant

Nurse Practitioner

• Adding Users

2

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User

* 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

all fields marked with asterisks * are required

User Type = Portal

It is highly recommended adding the User's organizational email. Personal emails are discouraged. After user creation, Email, First Name, Middle Name, and NPI cannot be modified for security reasons.

• Adding Users

4

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!



 **Error**
Contact Exist with the given email at Different account



SEARCH

• Bulk Users Creation

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** Portal

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

3 • Bulk User Creation

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

Create Users

Title	Organization	First Name	Last Name	PDMP Specialty	Email	Phone	Department
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
Dentist	Test Account	Carina	Cunningham		c.cunningham@randatmail.com		Pain Management
Dentist	Test Account	Isabella	Stevens		i.stevens@randatmail.com		Family Medicine

• Bulk User Creation

4

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.

Message

1 successfully created
0 failed Records

Confirm

Cancel

• Bulk User Creation

HOME ACCOUNTS USERS **ADD USERS**

Single User **Bulk User** Unprocessed U

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.

Or drop files

 Portal (

Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Type	License State	CDS	DEA	Status
Reprocess Users													
Error Message													
Please Provide Valide NPI	Physician	Junior Smoke Test	Yello70	Clouds70									

- 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
- Complete the indicated field updates and click the *Reprocess Users* button
- Any Users with unfixed errors 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



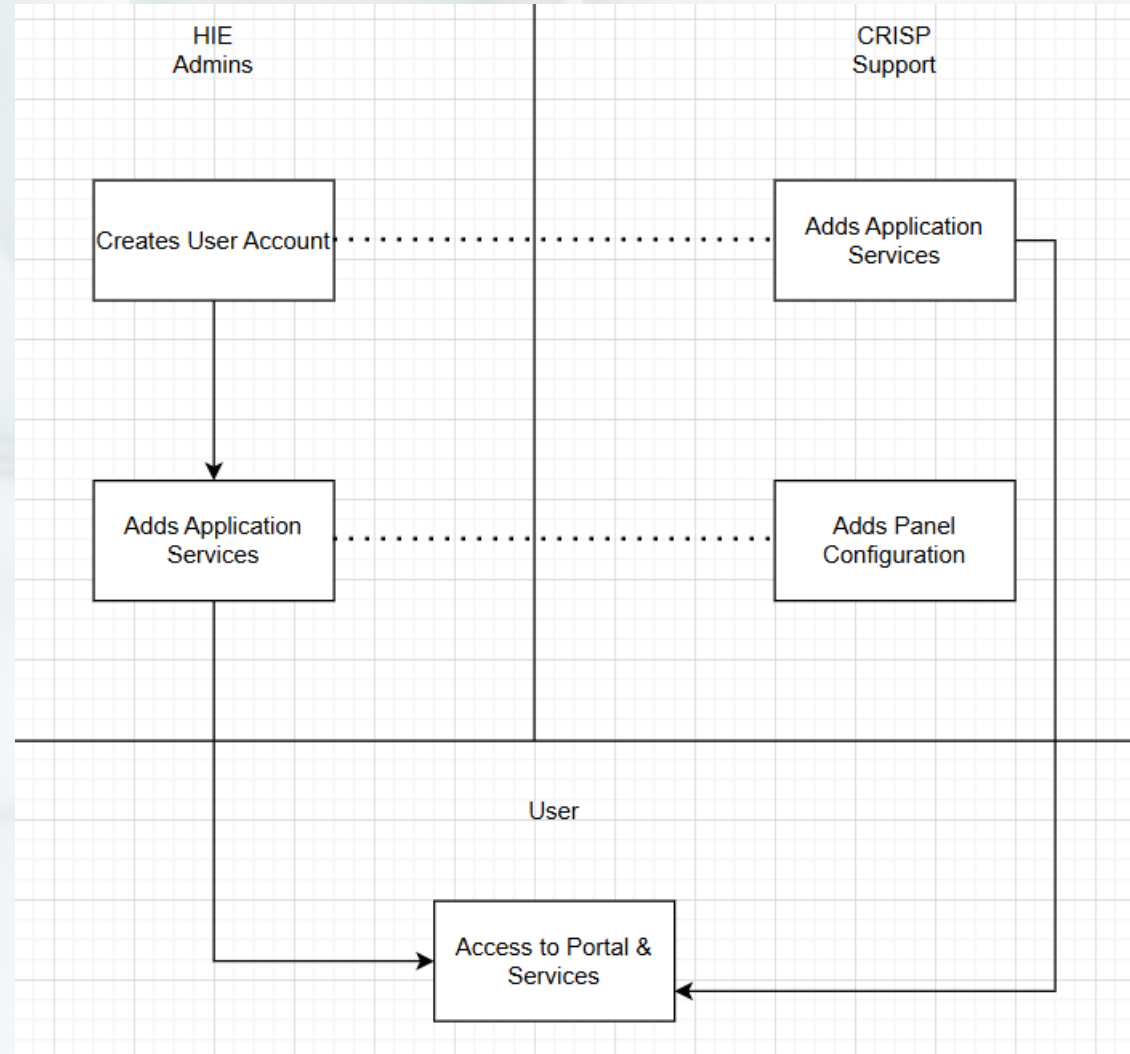
Provisioning Services

• Provisioning Services

- Creating a user grants access to the CRISP Portal but does not automatically grant access to CRISP applications.
 - Services are referred to as assets or applications or services
- HIE Administrators must assign specific services to user accounts to enable access to portal applications.
- Certain services are restricted and can only be provided to end users by CRISP Support.
 - Application that require Panel Access such as Population Explorer need CRISP Support to configure panel access



Provisioning Services



HIE Admin: Provisioning Services

CRISP Portal Services Available via HIE Admin

Service	Service Description
Clinical Information	Clinical Information gives providers the ability to access critical health information and alerts about patients, including medication data, lab results, radiology reports, encounter information and more.
Consent Tool	Enables users to register patient consent for Substance Use Disorder (SUD) and Mental Health (MH) data on behalf of their patients.
Emergency Department Advisory System (EDAS)	Enables access to show hospital diversion status to support EMS workflows.
MOM Care Plan	Enables Case Managers to create care plans for mothers who are enrolled into the Maternal Opioid Misuse Program.
Population Explorer	Offers a user-friendly interface for clinicians and care teams to review patient encounters from CEND, providing access to the latest encounters and six-month encounter history.
Referrals	Allows users to search Community Based Organizations (CBOs) to find community programs, create a patient referral to a CBO, and manage referrals sent to them all in one application

SBIRT Reporting	MDPCP reporting tool for substance use Screening, Brief Intervention, and Referral to Treatment (SBIRT)
SDOH Screening	Allows users to create assessments for a patient, view previously completed assessments, and view conditions assessed in screenings from other organizations
Snapshot	Enables users to view widgets such as encounter history, medications, diagnoses, procedures and claims data, that provide critical information on their patient. Widgets display an aggregation of both clinical and non-clinical data for the selected patient, pulling information from internal and external sources to provide an at-a-glance view of the patient's clinical history.
SNF Transfer to ED Form	Form approved by all hospitals in MD as an acceptable transfer form.

Portal Services Available via Technical User Support through Admin

Service	Service Description
CRISP Reporting Services (CRS)	CRS is currently a stand-alone portal with hundreds of valuable reports and dashboards that support organizations with quality improvement, strategic planning, financial modeling, and other activities. Some organizations have begun transitioning to CRS access via the CRISP Portal. This is an ongoing migration process.
CRISP Reporting Services – Role Manager	Access to the CRISP Reporting Services (CRS) application where these reports are housed is provisioned using Role Manager. Organizations have a CRS Point of Contact who provisions access to summary and/or patient level reports within CRS.
Emergent Imaging	Enables faster, more efficient diagnosis and treatment of strokes. Only members of stroke team at Comprehensive or Thrombectomy Capable Stroke Centers are eligible for access to Emergent, as no patient search is required, and 72-hours' worth of stroke images are made available.
HIE Admin Tool	Allows HIE Administrators to manage user access to the HIE Portal. User account creation or suspension, 90-day audit/user verification, and access to specific HIE Services are handled via the tool.
PDMP Maryland	Access to the Maryland Prescription Drug Monitoring Program data, which monitors controlled substances dispensed by Maryland prescribers.
Prescriber Reports	Access to Prescriber Reports, which include Personal Controlled Substance Prescribing History, Electronic Unsolicited Reporting Notifications and more. Individual DEA required.
Panel Processor	Enables users to upload patient panels to the HIE for CEND, COVID reporting, etc.
Transfer to PACS (TTP)	Allows users to download images into their image storage system, also known as PACs. User access is not automatic and must be approved by a PACS administrator before being granted. Upon request, Technical User Support will reach out to the Image Exchange Project Manager, who will reach out to the PACS Administrator to confirm.

CRISP Support: Provisioning Services

• Provisioning Services

HOME ACCOUNTS **USERS** ADD USERS USER GUIDE & HELP

All Contacts

Search Contact
Q user account

Name	Account Name	Member Title	Email	Phone	Status
User Account	Junior Smoke Test	Scribe	useraccounts@crispshare...	111111111	Active

Page 1 of 1

1b (User Account name)
1a (Search bar)

- (1a) Access the active User using the search bar in the *Users* tab
- (1b) Click on the User's name
- (1c) Select *Service Management*
- (1d) Select *Assign Services*

HOME ACCOUNTS **USERS** ADD USERS USER GUIDE & HELP

Contact
User Account

+ Follow Service Management

Account Name: Junior Smoke Test
HIE Source: CRISP-MD
Phone: (111) 111-1111
Email: useraccounts@crispsharingservices.com

DETAILS USER SERVICES

1c (Service Management button)

SP-MD lkdfjsajkl@lsaksjfdlakjf234.com

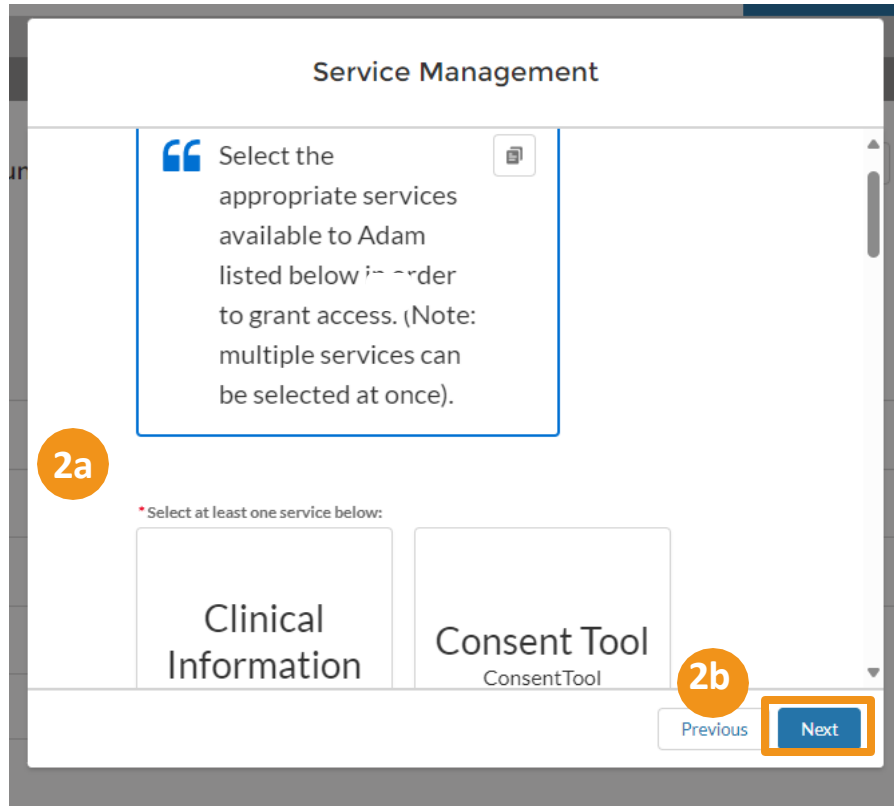
Service Management

*Select Service Choices

Assign Services
Deactivate Services

1d (Assign Services button)

• Provisioning Services



Service Management

Select the appropriate services available to Adam listed below in order to grant access. (Note: multiple services can be selected at once).

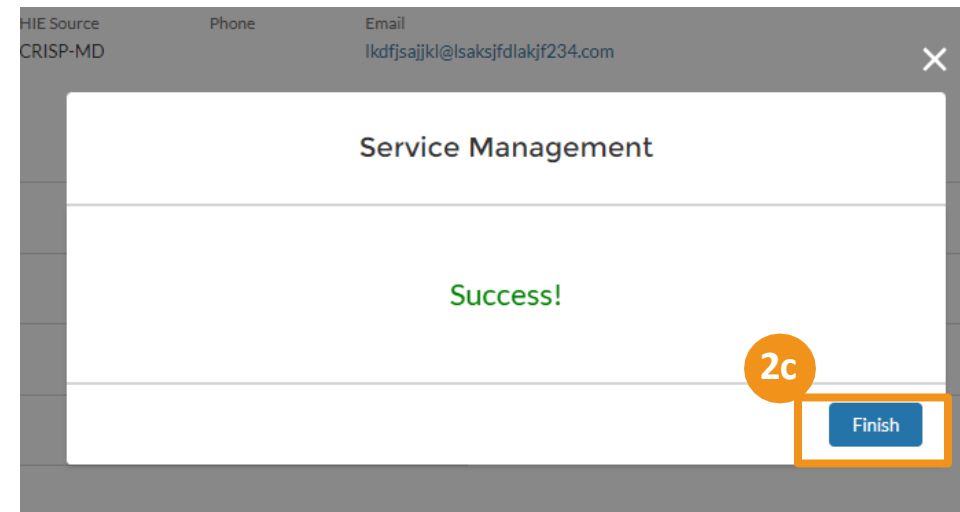
2a

*Select at least one service below:

- Clinical Information
- Consent Tool
ConsentTool

2b Next

- (2a) Assign Service: Select Service you wish to assign
- (2b) Click *Next*
- (2c) Click *Finish*



HIE Source: CRISP-MD
Phone:
Email: lkdfjsajkl@lsaksjfdlakjf234.com

Service Management

Success!

2c Finish

• Provisioning Services

HIE Administrators can provision a service to multiple users through their associated account. (ex: Upon creation of multiple new users via bulk upload)

(3a) Select the Account associated with the Users who need access to a service

(3b) Select *Services* tab – the Service tab will display all services available for Admins to add to users of this account

HOME ACCOUNTS **USERS** ADD USERS

Accounts
All Accounts ▼

10 items • Sorted by Account Name • Filtered by All accounts

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

3a

Account
Next Generation LLC

Website
Industry
Ambulatory

DETAILS PANELS **SERVICES** ACTIVE USERS SUSPENDED USERS

Account Name
Next Generation LLC

Parent Account

Industry
Ambulatory

● Provisioning Services

2

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Account **Next Generation LLC** + Follow User Export New Note Audit ▼

Website Industry
Ambulatory Medical

DETAILS PANELS **SERVICES** ACTIVE USERS SUSPENDED USERS

Services	Org Service	Status	Activation Date
CSS Event Notification Delivery (CEND)	Next Generation LLC - CEND	Active	10/9/2024
Consent Tool	Next Generation LLC - ConsentTool	Active	6/22/2022
Referrals	Next Generation LLC - ReferralUI	Active	1/11/2022
Clinical Information	Next Generation LLC - InContext	Active	1/11/2022
Snapshot	Next Generation LLC - Snapshot	Active	1/11/2022

[View All](#)

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Asset **Next Generation LLC - CEND** 4c Service Management

Account Contact Product Status
[Next Generation LLC](#) [CSS Event Notification Delivery \(CEND\)](#) Active

DETAILS RELATED

Asset Name Next Generation LLC - CEND	Status Active
Account Next Generation LLC	Install Date ⓘ 10/9/2024
Usage End Date	Deactivation Reason

Snapshot Active 5/8/2023

Service Management

*Select Service Choices

4d

Assign Services
Deactivate Services

- (4a) Identify service name in the "Service" column
- (4b) Click on the Org Service blue hyperlink (next to the Service) you would like to provision to Users
- (4c) Click *Service Management*
- (4d) Click *Assign Services*

Note: If your organization utilizes Population Explorer by CSS Encounter Notification Delivery (CEND), then provisioning CEND to your users will give them Population Explorer Access.

● Provisioning Services

3

Select Users:

(5a) Select the User(s) you are granting access this service by checking the box name to their name (5b) Click *Confirm Selections*

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.

<
>

5a

				Name	Email
1	<input type="checkbox"/>			Aalnerer1 chestington1	aalnerer1chestingto
2	<input checked="" type="checkbox"/>			Aalnerer10 chestingto...	aalnerer10chestingt
3	<input type="checkbox"/>			Aalnerer100 chestingt...	aalnerer100chestingto...
4	<input checked="" type="checkbox"/>			Aalnerer101 chestingt...	aalnerer101chestingto...

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

5b

Confirm Selections

• Provisioning Services

Confirm Selections:

(6a) Review and confirm list of users who should access this service

(6b) click *Complete!*

(6c) 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:

	Name	Email	Member Title
1	Aalnerer10 chestington10	aalnerer10chestington1...	
2	Aalnerer11 chestington11	aalnerer11chestington1...	
3	Aalnerer13 chestington13	aalnerer13chestington1...	
4	Aalnerer101 chestington...	aalnerer101chestington...	

<
>

Previous
Complete!

6a

6b

Assign Service

Assign Snapshot Service

Select Access
✓
✓
Complete!

Success!

Finish

6c



Removing Services

• Removing Services

- (1a) Access the active User using the search bar at the top of the *Users* tab
- (1b) Click on the User's name
- (1c) Click *Service Management*
- (1d) Click *Deactivate Services*

HOME ACCOUNTS **USERS** ADD USERS USER GUIDE & HELP

All Contacts

1a

Name	Account Name	Member Title	Email	Phone	Status
1b User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active

< Previous Page 1 of 1 Next >

HOME ACCOUNTS **USERS** ADD USERS USER GUIDE & HELP

Contact **User Account** + Follow Edit 1c Service Management

Account Name: Junior Smoke Test | HIE Source: CRISP-MD | Phone: (111) 111-1111 | Email: useraccounts@crispsharedservices.com

DETAILS USER SERVICES

CRISP-MD | lkdfjsajjkl@lsaksjfdlakjf234.com

CES

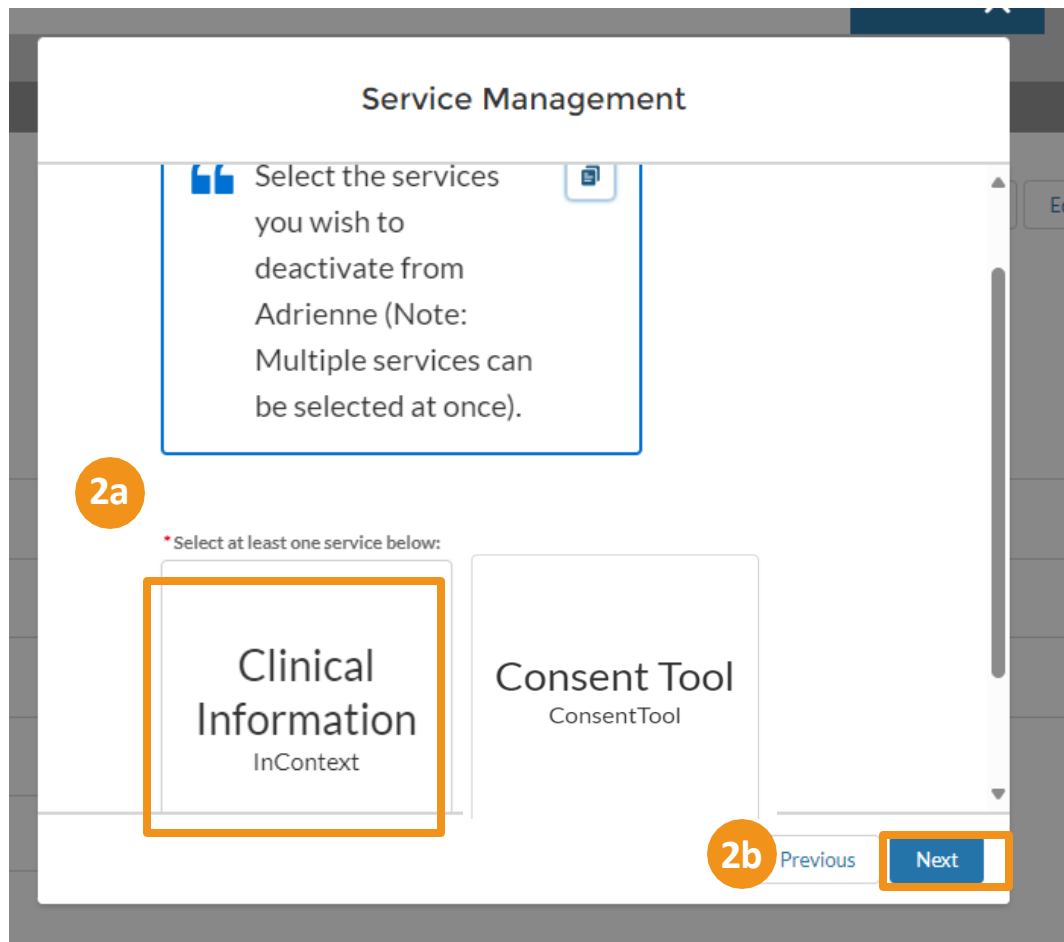
Service Management

*Select Service Choices

1d Assign Services Deactivate Services

• Removing Services

2



Service Management

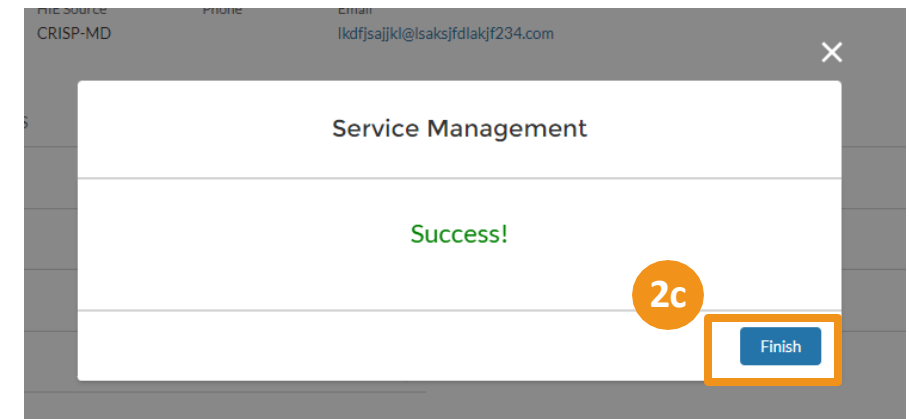
Select the services you wish to deactivate from Adrienne (Note: Multiple services can be selected at once).

Select at least one service below:

- 2a** Clinical Information InContext
- Consent Tool ConsentTool

2b Previous Next

- (2a) Click on the Service(s) you wish to deactivate
- (2b) Click *Next*
- (2c) Click *Finish*



Service Management

Success!

2c Finish



Password & Activation Email Reset

• Password & Activation Email Reset

HOME ACCOUNTS **USERS** ADD USERS USER GUIDE & HELP

All Contacts

1a Search Contact

Name	Account Name	Member Title	Email	Phone	Status
1b User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active

Page 1 of 1

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Contact **User Account** + Follow Edit Service Management

Account Name: Junior Smoke Test
 HIE Source: CRISP MD
 Phone: (111) 111-1111
 Email: useraccounts@crispshareservices.com

DETAILS **1c USER SERVICES**

User Services (3)

Service	User Services	Status	Username	Activation Date
Snapshot	User Account - Junior Smoke Test - Snapshot	Active		6/14/2024
Clinical Information	User Account - Junior Smoke Test - InContext	Active		6/14/2024
HIE Portal	User Account - Junior Smoke Test - Portal	Active	useraccounts@crispshareservices.com	

1d View All

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

- (1a) Search for User in Users tab
- (1b) Click on User's name
- (1c) Click on *User Services* tab
- (1d) Click View All to expand view

• Password & Activation Email Reset

2

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

DETAILS USER SERVICES

 **User Services (3)**

Service	User Services	Status	Username	Activation Date
Snapshot	User Account - Junior Smoke Test - Snapshot	Active		6/14/2024
Clinical Informati	User Account - Junior Smoke Test - InContext	Active		6/14/2024
HIE Portal	User Account - Junior Smoke Test - Portal	Active	useraccounts@crispsharingservices.com	6/14/2024

2a

[View Less](#)

Password & 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*

Asset
Plum10 Fruit10 - Next Generation LLC - Portal

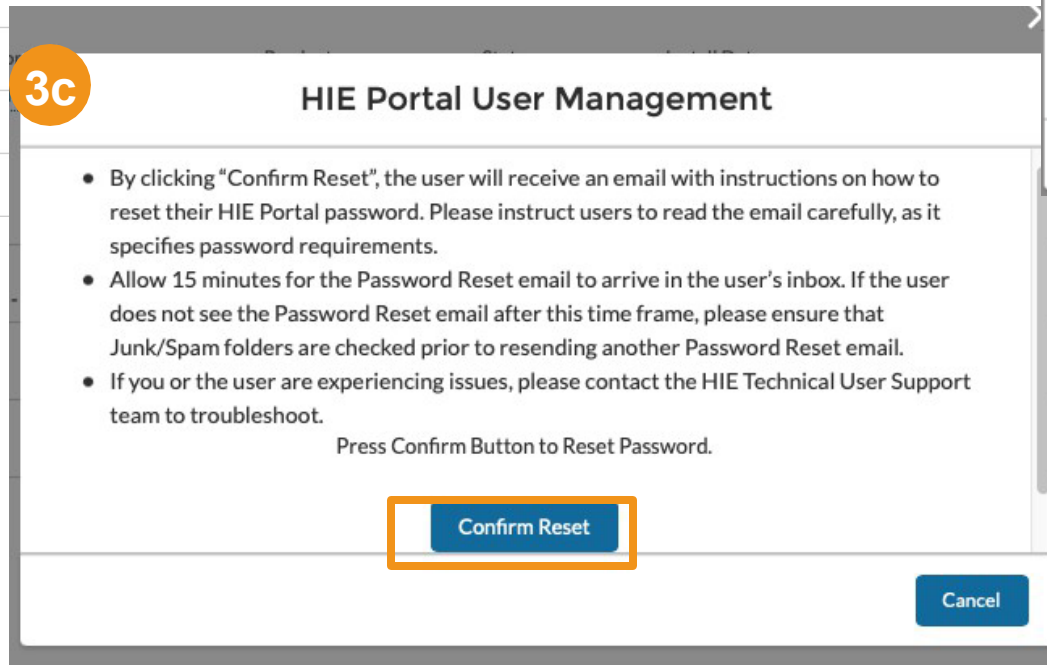
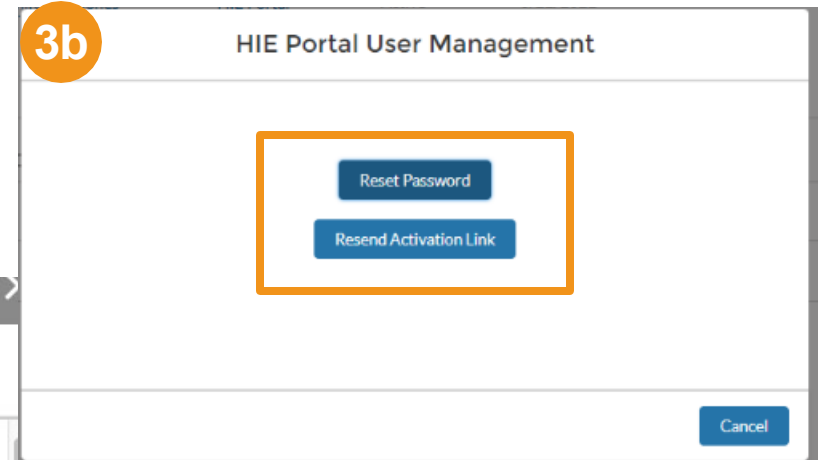
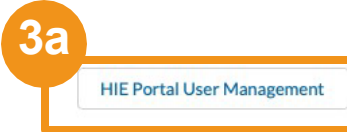
Account	Contact	Product	Status	Install Date
Next Generation LLC	Plum10 Fruit10	HIE Portal	Active	6/22/2022

DETAILS

Asset Name
Plum10 Fruit10 - Next Generation LLC - Portal

Account
[Next Generation LLC](#)

Product
[HIE Portal](#)

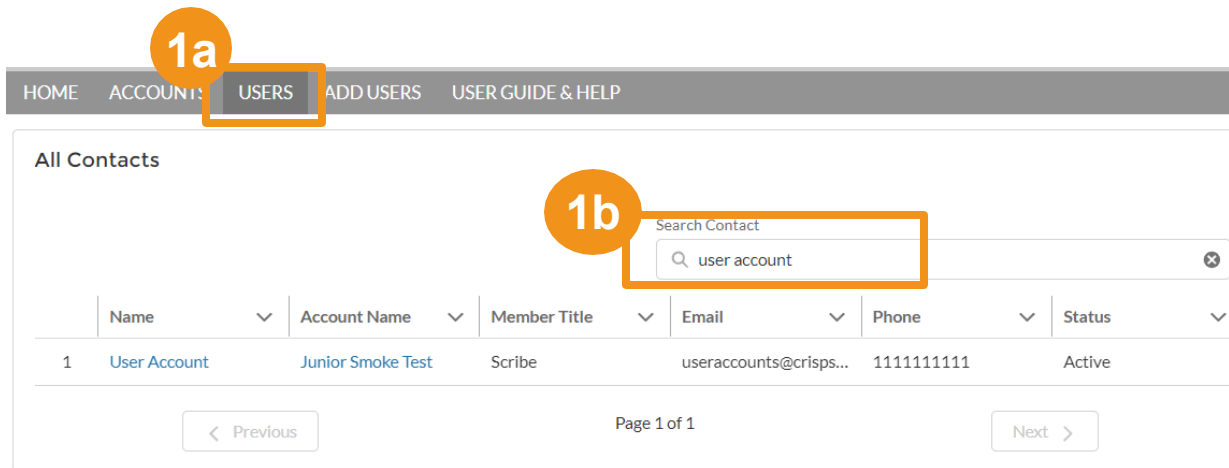




Editing User Details

• Editing User Details

1



The screenshot shows the CRISP system interface. The navigation bar at the top has tabs for HOME, ACCOUNTS, **USERS**, ADD USERS, and USER GUIDE & HELP. The 'USERS' tab is highlighted with an orange box and labeled '1a'. Below the navigation bar, the page title is 'All Contacts'. A search box labeled 'Search Contact' contains the text 'user account' and is highlighted with an orange box and labeled '1b'. Below the search box is a table with the following columns: Name, Account Name, Member Title, Email, Phone, and Status. The table contains one row with the following data: 1, User Account, Junior Smoke Test, Scribe, useraccounts@crisps..., 1111111111, Active. At the bottom of the page, there are navigation buttons for '< Previous', 'Page 1 of 1', and 'Next >'.

(1a) Go to Users tab

(1b) Enter name or email in the search and hit enter

2 • Editing User Details

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

HOME ACCOUNTS **USERS** ADD USERS USER GUIDE & HELP

All Contacts

Search Contact
user account

	Name	Account Name	Member Title	Email	Phone	Status
1	User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active

< Previous Page 1 of 1 Next >

3 Editing User Details

Note: For security purposes, HIE Admins may only edit existing user's Last Name, Salutation, Suffix and Phone Number. If needing to edit an existing user's e-mail, please contact Technical User Support OR deactivate the current user account and create a new one with the user's updated e-mail.

HOME ACCOUNTS USERS ADD USERS

Contact **Ronald Test**

+ Follow **3a** 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	

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

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

Edit Contact

*Name

Salutation: --None--

First Name: John

Middle Name:

*Last Name: Doe

Suffix:

Account Name: Next Generation LLC

Member Title: Nursing Home Administrator

Department Picklist: Cancer Registry

User Status: Active

Email: johndoe1234@email1234.com

Phone: 2223332222

Mobile: 2223332222

Cancel Save & New **3b** Save



Bulk Export User List

• Bulk Export User List

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Accounts Recently Viewed ↑ New

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 **Interstellar LLC**

Website Industry Ambulatory Medical

+ Follow User Export New Note Audit

DETAILS ACTIVE USERS SUSPENDED USERS PANELS SERVICES

Account Name Account Owner

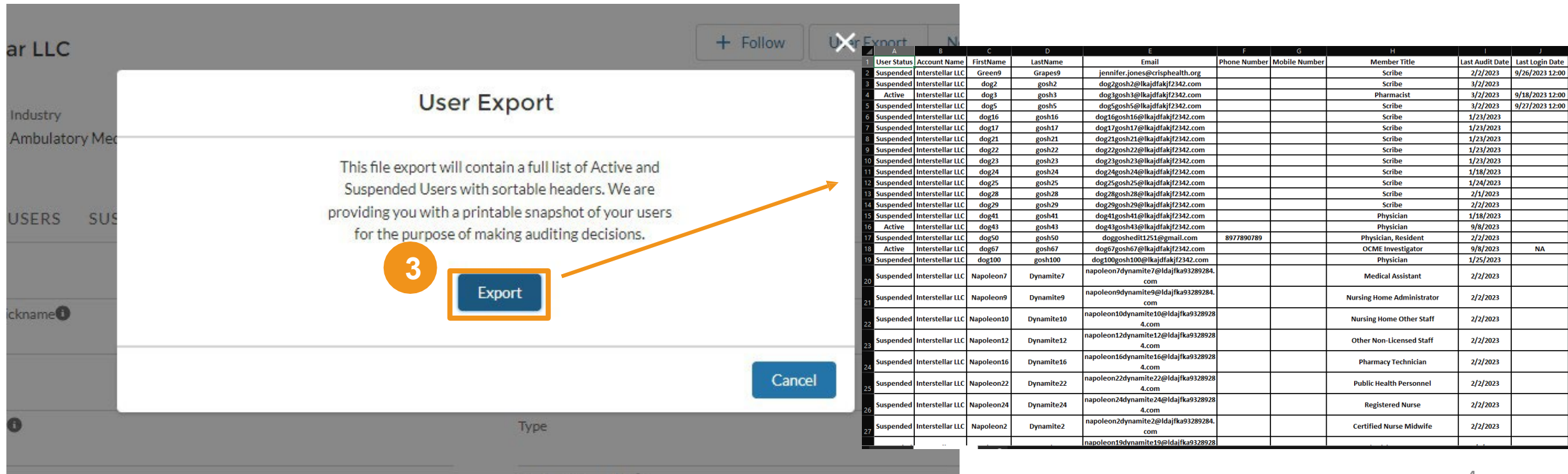
(1a) Choose the Account you would like to view by clicking on the Account Name

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

• Bulk Export User List

(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.



User Export

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.

3 **Export** **Cancel**

	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	9/27/2023 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	dogdogshed1251@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					

