

HIE Admin Tool User Guide

The Health Information Exchange (HIE) Admin Tool allows HIE Administrators to manage their colleagues' HIE accounts.

This guide provides step-by-step information on the basic functions of the HIE Admin Tool.



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Tool Overview

In the HIE Admin Tool you can:



- Create Users
- Reactivate Suspended Users
- Recreate Deactivated Users



- View Account Services
- Provision Services to Users
- Deactivate Services from 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.

Important Terms



HIE Admin User Guide – Important Terms

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.

Suspended User: A User whose access to HIE Tools has lapsed due to inactivity, inappropriate use, lack of HIE Admin auditing every 90 days or a change of employment.

Prescription Drug Monitoring Program (PDMP): Access to this service can be obtained by calling HIE Technical User Support Team at the number located at the beginning of this guide.

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 ends at the right edge of the slide.

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:

Log on to your HIE portal account.

(1a) After logging in, navigate to the "HIE Admin Tool" tile. There 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

1 Choosing an Account

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

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

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 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	Email
sherlock sherlock	holmes52@asdadas.com

Active Users	
Name	Email
pencil2 eraser2	pencil2eraser2@gkjdsldfd.com

4a

4b



Success

All records Successfully Updated



Creating Individual Users

A thick orange line that starts horizontally from the left edge, rises to a peak, and then descends to a lower horizontal level on the right side.

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 'ADD USERS' tab in the navigation menu, which is highlighted with a callout '1a'. Below the navigation, the 'Single User' option is selected and underlined, with a callout '1b'. The 'Bulk User' option is also visible. A red-bordered dropdown menu is open, showing a list of titles with a callout '1c' pointing to the '-None-' option. The dropdown list includes: -None- (selected), Cancer Registrar, Certified Nurse Midwife, Clinical Pharmacist, Dentist, Licensed Clinical Social Worker, LTC Consultant Pharmacist, Medical Assistant, and Nurse Practitioner. Below the dropdown, there is a red error message 'Complete this field.' and two buttons: 'Submit' and 'Cancel'.

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. After user creation, Email, First Name, Middle Name, and NPI cannot be modified for security reasons.

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 'Other Licensed Healthcare Practitioner' selected), 'Organization' (with '--None--' selected), 'User Type' (with '--None--' selected), 'First Name', 'Last Name', 'Email', 'Department' (with '--None--' selected), 'State License' (with '--None--' selected), 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 screenshot is a green success message pop-up: 'Success New User created successfully!' with a checkmark icon and a close button (X). A callout '3c' points to this message.

HIE Admin User Guide – Adding Individual Users

4 New User Creation Error

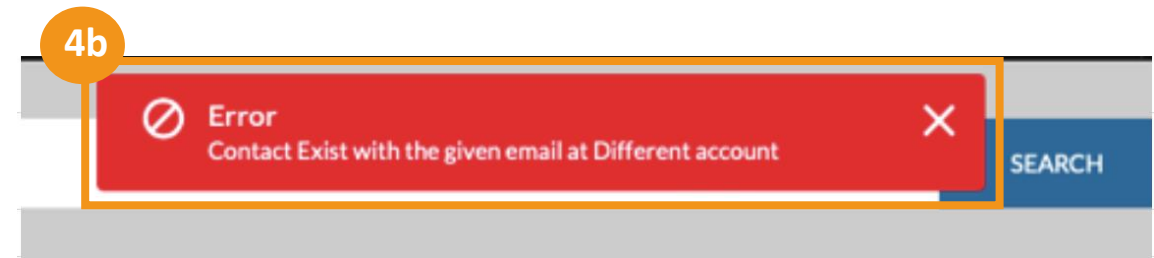
(4a) Reference from previous slide: Once attestations are checked and you click *Confirm*, the system will verify the email address submitted on the new User creation request

(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. **Search for the User in accounts that you manage – see User Search section. If the User does not exist in an account you manage, contact Technical User Support**

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.

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

Upload Files Or drop files Create Users

Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Type	License State	CDS
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HIE Admin User Guide – Adding Multiple Users

2 Uploading Files

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

Note: Follow this same process to reactivate a User that is currently deactivated. Access to services for these Users must be provisioned again, see *Provisioning Services* section for detailed instructions.

HOME ACCOUNTS USERS **ADD USERS**

Single User **Bulk User**

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

Or drop files

Create Users

Portal

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

Or drop files

Portal

3a

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

HIE Admin User Guide – Adding Multiple Users

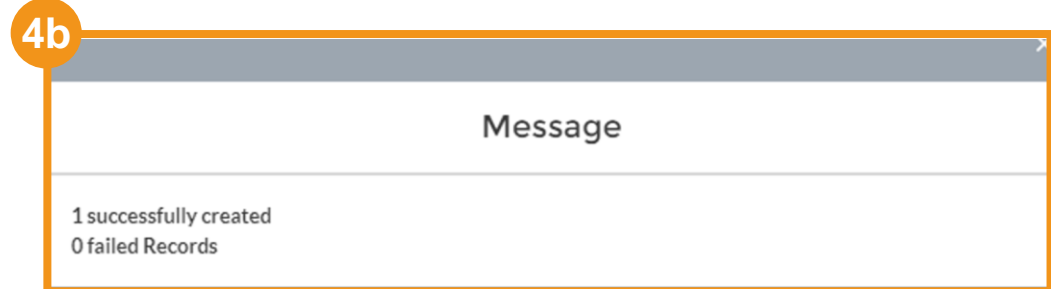
4 Submitting Updated Users & Attestation

(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

The screenshot shows the 'ADD USERS' section of the HIE Admin interface. At the top, there are navigation tabs: HOME, ACCOUNTS, USERS, and ADD USERS. Below these are sub-tabs for 'Single User' and 'Bulk User'. The 'Bulk User' tab is active. Underneath, there are 'Instructions:' and a list of steps for uploading users. Below the instructions is an 'Upload Files' button with a dashed box around it, and a 'Create Users' button. A table with 14 columns (Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License, License Type, License State, CDS, DEA, Status) is shown. A 'Reprocess Users' button is highlighted with an orange box and labeled '5b'. Below the table, there is a section for 'Error Message' with a highlighted '5a' label. The error message is 'Please Provide Valide NPI'. Below this, there are input fields for 'Physician', 'Junior Smoke Test', 'Yello70', and 'Clouds70'. A horizontal scrollbar is visible at the bottom of the table area.

Provisioning Services

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HIE Admin User Guide – Provisioning Services: Single User

1 Assign Services

- (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*

The screenshot shows the 'All Contacts' interface. At the top, there is a search bar labeled 'Search Contact' containing the text 'user account'. Below the search bar is a table with columns: Name, Account Name, Member Title, Email, Phone, and Status. The first row contains the following data: 'User Account', 'Junior Smoke Test', 'Scribe', 'useraccounts@crispshare...', '11111111', and 'Active'. An orange box labeled '1a' highlights the search bar, and another orange box labeled '1b' highlights the 'User Account' name in the table. Navigation buttons for 'Previous' and 'Next' are visible at the bottom of the table, along with 'Page 1 of 1'.

The screenshot shows the user profile page for 'User Account'. The page header includes navigation links: HOME, ACCOUNTS, USERS, ADD USERS, USER GUIDE & HELP. Below the header, there is a contact card for 'User Account' with a '+ Follow' button and a 'Service Management' button. The 'Service Management' button is highlighted with an orange box labeled '1c'. Below the contact card, there is a table with user details:

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

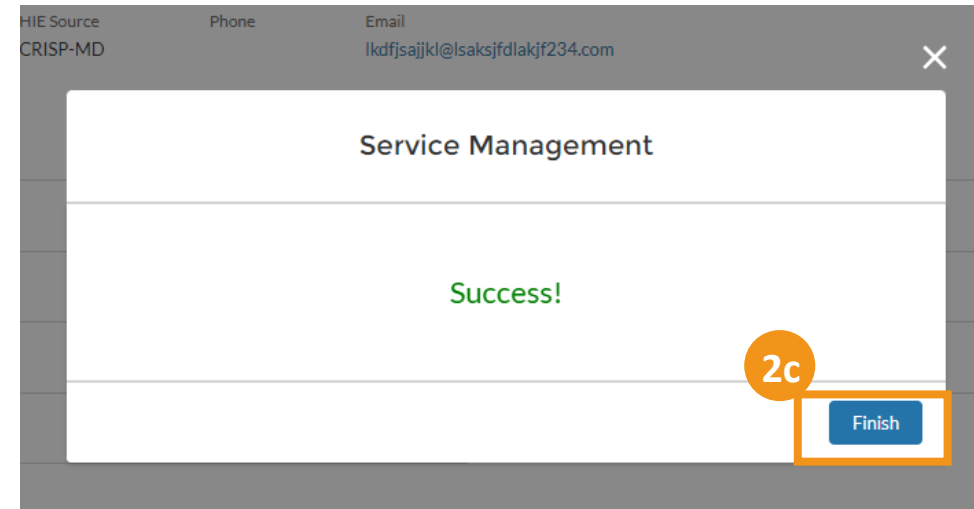
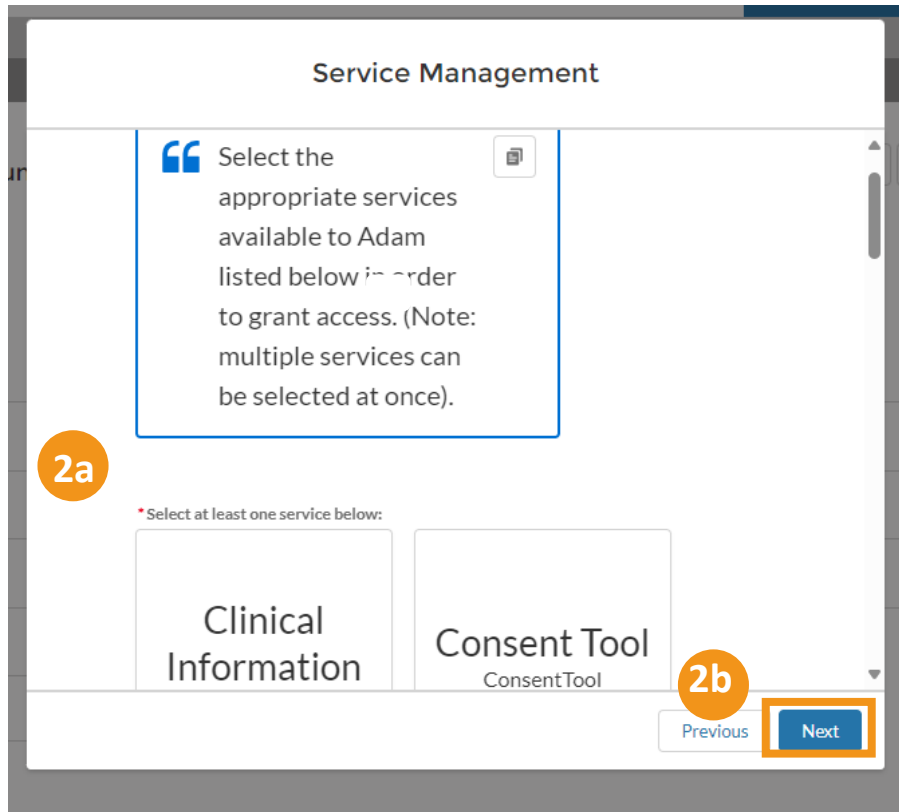
At the bottom of the page, there are two tabs: 'DETAILS' and 'USER SERVICES'.

The screenshot shows a modal window titled 'Service Management'. The window contains a section labeled '*Select Service Choices' with two buttons: 'Assign Services' and 'Deactivate Services'. The 'Assign Services' button is highlighted with an orange box labeled '1d'. The modal window has a close button (X) in the top right corner.

HIE Admin User Guide – Provisioning Services: Single User

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

2 Assign Services



HIE Admin User Guide – Provisioning a Service: Multiple Users

3

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)

(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

Account
Next Generation LLC

Website Industry
Ambulatory

3b

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

- (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*

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

4c

Service Management

Service Management

*Select Service Choices

[Assign Services](#)

[Deactivate Services](#)

4d

HIE Admin User Guide – Provisioning Services: Multiple Users

3 Select Users

Select Users:

(5a) Select the User(s) you are granting access this service by checking the box next to their name

(5b) Click *Confirm Selections*

Assign Service

Assign Snapshot Service

✓ **Select Users** Confirm Selections Complete!

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

	<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...	aalnerer100chestingto...
4	<input checked="" type="checkbox"/> Aalnerer101 chestingt...	aalnerer101chestingto...

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

5b

Confirm Selections

HIE Admin User Guide – Provisioning Services: Multiple Users

6 Confirm Selections

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:

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...	



< >

6a

6b Complete!

Assign Service

Assign Snapshot Service

Select Access   Complete!

Success!

6c Finish

Deactivating Services

HIE Admin User Guide – Deactivating Services: Single User

1 Deactivating a service for a single User

- (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 Search Contact
User Account

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 **1c** Service Management

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

DETAILS USER SERVICES

CRISP-MD | lkdfjsajjkl@lsaksjfdlakjf234.com

Service Management

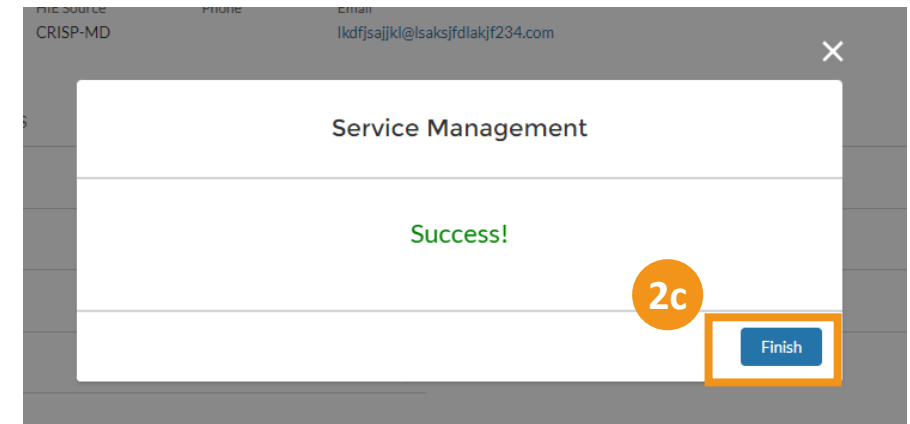
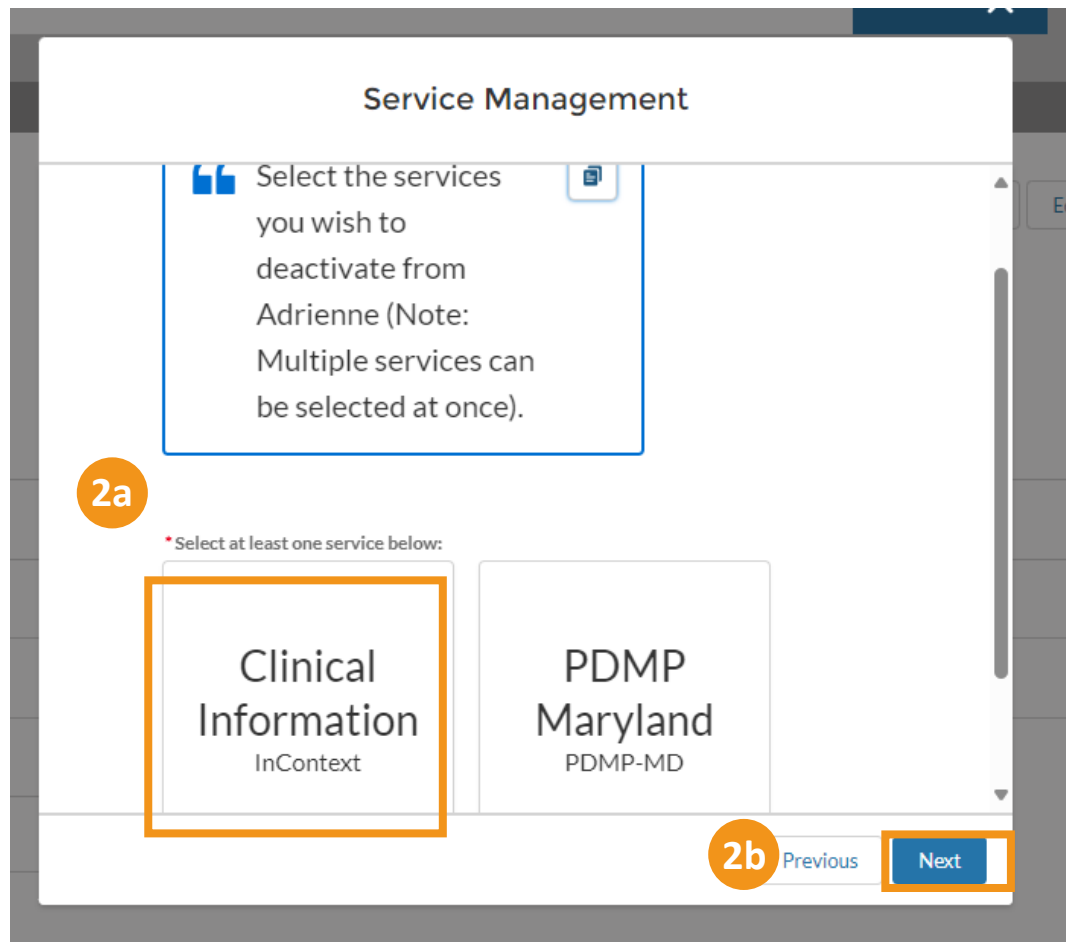
*Select Service Choices

1d Assign Services Deactivate Services

HIE Admin User Guide – Deactivating Services: Single User

2 Deactivating a service for a single User

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



User Search



HIE Admin User Guide – User Search

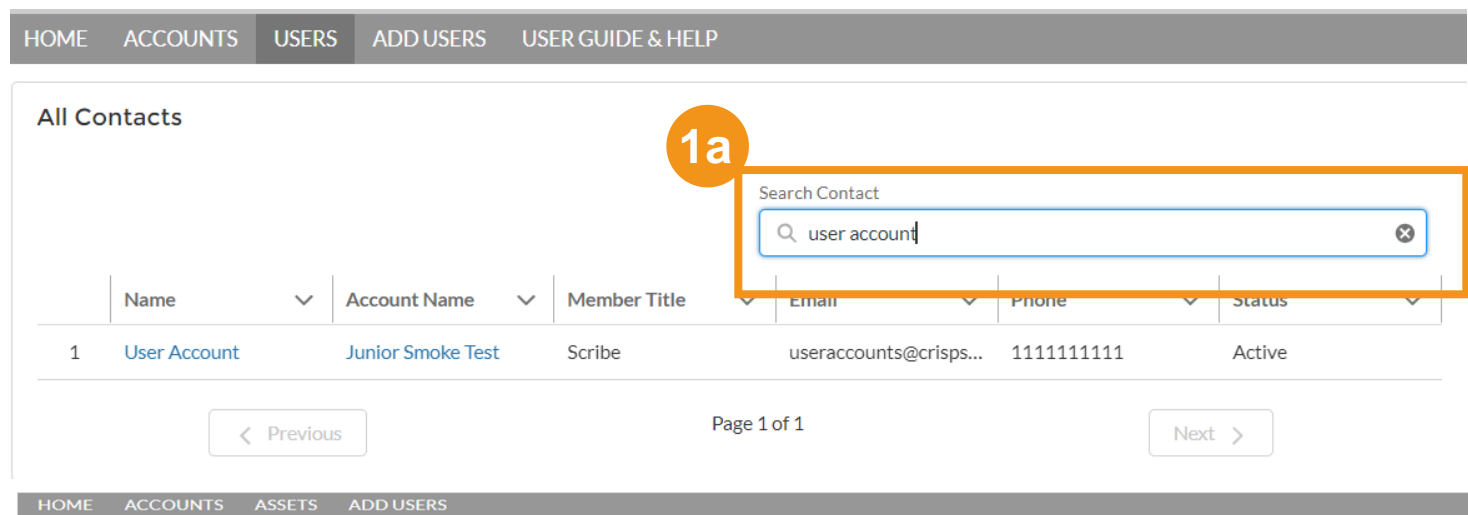
1 Locating a User

Search for Users in any account you manage:

(1a) Enter User's first name, last name, full name or email address in the search bar at the top of the Users tab

Search for Users within the User Audit Page

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



The screenshot shows the 'All Contacts' section of the HIE Admin interface. At the top, there is a navigation bar with 'HOME', 'ACCOUNTS', 'USERS', 'ADD USERS', and 'USER GUIDE & HELP'. Below this, a search bar labeled 'Search Contact' contains the text 'user account'. An orange box highlights this search bar, with a callout '1a' next to it. Below the search bar is a table with columns: Name, Account Name, Member Title, Email, Phone, and Status. The table contains one row: '1 User Account', 'Junior Smoke Test', 'Scribe', 'useraccounts@crisps...', '1111111111', and 'Active'. At the bottom of the table, there are 'Previous' and 'Next' buttons and 'Page 1 of 1'.



The screenshot shows the 'HIE Admin - User Audit Page'. The title is 'Audit Account : Test Account'. Below the title, there are instructions: '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.', and 'No Selection - The user "Status" will remain the same and the Audit Date will not be updated.' A note says 'NOTE: All users must be verified once every 90 days to maintain access.' Below this, there is a search bar labeled 'Search' with a magnifying glass icon. An orange box highlights this search bar, with a callout '1b' next to it. Below the search bar, there are two tabs: 'Active User' (selected) and 'Suspended User'. At the bottom, there is a 'Active Users' section with an 'Approve All' button.

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

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

All Contacts

1a Search Contact
user account

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

1b

< Previous Page 1 of 1 Next >

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@crisps... 1111111111 Active

1c

DETAILS **USER SERVICES**

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@crisps...	

1d View All

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 (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	

[View Less](#)

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 menu shows 'Asset', 'Account', 'Contact', 'Product', 'Status', and 'Install Date'. The details section lists 'Asset Name', 'Account', and 'Product'. A pop-up window titled 'HIE Portal User Management' is open, showing instructions for resetting a password or activation email. The 'Confirm Reset' button is highlighted with an orange box, and the 'Reset Password' and 'Resend Activation Link' buttons are also highlighted with orange boxes. Arrows indicate the flow from the main menu to the pop-up window and from the pop-up window to the 'Confirm Reset' button.

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



HIE Admin User Guide – Editing User Details

1 Choosing a User

(1a) Go to Users tab

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

The screenshot shows the HIE Admin interface. At the top, a navigation bar contains the following items: HOME, ACCOUNTS, **USERS** (highlighted with an orange box and labeled '1a'), ADD USERS, and USER GUIDE & HELP. Below the navigation bar, the page title is 'All Contacts'. A search bar labeled 'Search Contact' contains the text 'user account' (highlighted with an orange box and labeled '1b'). Below the search bar is a table with the following columns: Name, Account Name, Member Title, Email, Phone, and Status. The table contains one row of data:

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

At the bottom of the page, there are navigation buttons: '< Previous', 'Page 1 of 1', and 'Next >'.

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

The screenshot displays the 'All Contacts' section of the HIE Admin User Guide. At the top, there is a navigation bar with links: HOME, ACCOUNTS, USERS, ADD USERS, and USER GUIDE & HELP. Below the navigation bar, the 'All Contacts' section is visible. It includes a search bar labeled 'Search Contact' with the text 'user account' entered. Below the search bar 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, and Active. The 'User Account' cell in the first column is highlighted with an orange box, and a callout '2a' is placed next to it. At the bottom of the table, there are navigation buttons: '< Previous', 'Page 1 of 1', and 'Next >'.

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

HIE Admin User Guide – Editing User Details

3 Editing and Saving a Contact

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.

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

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

The screenshot displays the 'Edit Contact' interface. At the top, a navigation bar includes 'HOME', 'ACCOUNTS', 'USERS', 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). Below this is a 'DETAILS' section with a table of contact information. An 'Edit Contact' modal is open on the right, containing form fields for Name (Salutation, First Name, Middle Name, Last Name, Suffix), Account Name (Next Generation LLC), Member Title (Nursing Home Administrator), Department Picklist (Cancer Registry), and User Status (Active). The 'Save' button is highlighted with a blue box and a '3b' callout. The 'Edit' button in the top right of the contact profile is highlighted with an orange box and a '3a' callout.

DETAILS	RELATED
Name Ronald Test	Contact Owner Avideon CRISP
Account Name Jones Practice LLC	Contact Type

Name	Salutation	First Name	Middle Name	Last Name	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		

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', 'ADD USERS', and 'USER GUIDE & HELP'. Below this, the 'Accounts' section is titled 'Recently Viewed' and shows a list of two accounts. The first account, 'Jones Practice LLC', is highlighted with a blue background and a red box around its name, with a red circle containing '1a' next to it. The second account is 'Partlow Medical'. Below the list, the details for 'Account: Interstellar LLC' are shown, including its website and industry ('Ambulatory Medical'). To the right of the account details, a toolbar contains several buttons: '+ Follow', 'User Export' (highlighted with a red box and a red circle containing '2'), 'New Note', and 'Audit'. At the bottom, a navigation bar includes 'DETAILS', 'ACTIVE USERS', 'SUSPENDED USERS', 'PANELS', and 'SERVICES'. The 'Account Name' and 'Account Owner' fields are visible at the bottom of the page.

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

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 'Export' button is highlighted with a blue border and a circled number '3'. An orange arrow points from the 'Export' button to the table below. The table lists user details with columns for User Status, Account Name, First Name, Last Name, Email, Phone Number, Mobile Number, Member Title, Last Audit Date, and Last Login Date.

	A	B	C	D	E	F	G	H	I	J
	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@lkajdfakjf2342.com			Scribe	3/2/2023	
4	Active	Interstellar LLC	dog3	gosh3	dog3gosh3@lkajdfakjf2342.com			Pharmacist	3/2/2023	9/18/2023 12:00
5	Suspended	Interstellar LLC	dog5	gosh5	dog5gosh5@lkajdfakjf2342.com			Scribe	3/2/2023	9/21/2023 12:00
6	Suspended	Interstellar LLC	dog16	gosh16	dog16gosh16@lkajdfakjf2342.com			Scribe	1/23/2023	
7	Suspended	Interstellar LLC	dog17	gosh17	dog17gosh17@lkajdfakjf2342.com			Scribe	1/23/2023	
8	Suspended	Interstellar LLC	dog21	gosh21	dog21gosh21@lkajdfakjf2342.com			Scribe	1/23/2023	
9	Suspended	Interstellar LLC	dog22	gosh22	dog22gosh22@lkajdfakjf2342.com			Scribe	1/23/2023	
10	Suspended	Interstellar LLC	dog23	gosh23	dog23gosh23@lkajdfakjf2342.com			Scribe	1/23/2023	
11	Suspended	Interstellar LLC	dog24	gosh24	dog24gosh24@lkajdfakjf2342.com			Scribe	1/18/2023	
12	Suspended	Interstellar LLC	dog25	gosh25	dog25gosh25@lkajdfakjf2342.com			Scribe	1/24/2023	
13	Suspended	Interstellar LLC	dog28	gosh28	dog28gosh28@lkajdfakjf2342.com			Scribe	2/1/2023	
14	Suspended	Interstellar LLC	dog29	gosh29	dog29gosh29@lkajdfakjf2342.com			Scribe	2/2/2023	
15	Suspended	Interstellar LLC	dog41	gosh41	dog41gosh41@lkajdfakjf2342.com			Physician	1/18/2023	
16	Active	Interstellar LLC	dog43	gosh43	dog43gosh43@lkajdfakjf2342.com			Physician	9/8/2023	
17	Suspended	Interstellar LLC	dog50	gosh50	doggoshed11251@gmail.com	8977890789		Physician, Resident	2/2/2023	
18	Active	Interstellar LLC	dog67	gosh67	dog67gosh67@lkajdfakjf2342.com			OCME Investigator	9/8/2023	NA
19	Suspended	Interstellar LLC	dog100	gosh100	dog100gosh100@lkajdfakjf2342.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	
27	Suspended	Interstellar LLC	Napoleon19	Dynamite19	napoleon19dynamite19@ldajfka93289284.com					