

# 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

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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. 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 of the slide, rises to a peak in the upper right quadrant, and then descends to a horizontal line that continues to the right edge of the slide.

# HIE Admin User Guide – Accessing the Tool

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## 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

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

| Phone | Website | Type | Industry   | Account Owner        |
|-------|---------|------|------------|----------------------|
|       |         |      | Ambulatory | <u>Outreach Team</u> |

# 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 <span>Approve</span> <span>Deny</span> | Laughter Ajibade | laughter@test.com | Nurse Practitioner |            | 2021-03-16 | 2021-03-16 |
| <span>Approve</span> <span>Deny</span>    | Peter Shay       | shay@test.com     | Physician, Intern  |            | 2021-03-17 | 2021-03-17 |
| <span>Approve</span> <span>Deny</span>    | Test Thu1        | testthu1@test.com | Dentist            |            | 2021-03-17 | 2021-03-17 |
| <span>Approve</span> <span>Deny</span>    | Nick Redfurn     | nick@test.com     |                    |            | 2021-03-18 | 2021-03-18 |
| <span>Approve</span> <span>Deny</span>    | 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 of the slide, then rises to a peak, and then descends to a lower horizontal level before ending at the right edge.

# HIE Admin User Guide – Adding Individual Users

## 1 Selecting a Title

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

(1b) Ensure "Single User" is underlined

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

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

# HIE Admin User Guide – Adding Individual Users

## 2 Creating a New User

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

**NOTE: \*User Type – select “Portal”**

HOME ACCOUNTS USERS **ADD USERS**

Single User Bulk User

**2a**

Title  
Other Licensed Healthcare Practitioner

\* Organization  
--None--

\* User Type  
--None--

Complete this field.

\* First Name

\* Last Name

\* Email

\* Department  
--None--

State License  
--None--

Submit Cancel



# HIE Admin User Guide – Adding Individual Users

## 3 Submitting a New User & Attestation

- (3a) Once all required fields are filled out press the *Submit* button at the bottom the form
- (3b) After you click *Submit*, an attestation screen will appear, acknowledge the terms and conditions by clicking the check boxes then click *Confirm*
- (3c) A green pop-up message will appear once User has been successfully onboarded (see next slide for error guidance)

**NOTE: It is highly recommended adding the User's organizational email. Personal emails are discouraged. 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, with a '3a' callout pointing 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, with a '3b' callout pointing to the 'Confirm' button.

At the bottom of the page, a green success pop-up message is visible, stating 'Success New User created successfully!' with a checkmark icon and a close button (X), with a '3c' callout pointing to it.

# 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**

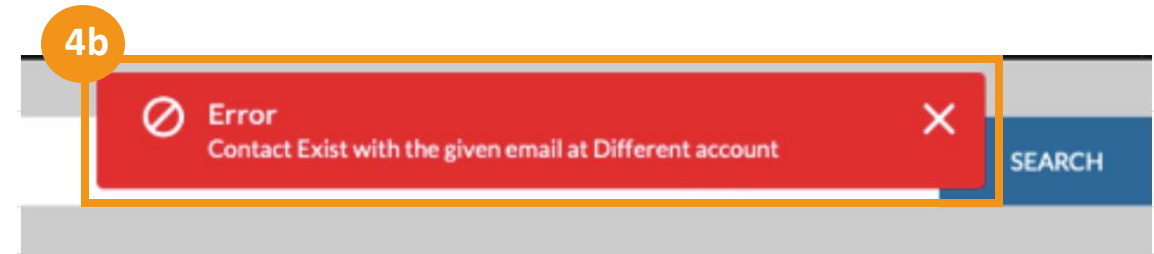
### Confirm

---

- 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 log-in credentials with another individual.

---

4a



# Creating Multiple Users



# HIE Admin User Guide – Adding Multiple Users

## 1. Preparing the *Bulk Upload* Form

(1a) Click the *Add Users* tab at the top of the home screen

(1b) Click the *Bulk User* tab

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

HOME ACCOUNTS USERS **ADD USERS**

Single User **Bulk User**

**Instructions:**

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

Portal

**Upload Files** Or drop files **Create Users**

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

# 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 |
|-------|--------------|------------|-----------|-------|-------|------------|-----|----------------------|--------------|---------------|-----|
|-------|--------------|------------|-----------|-------|-------|------------|-----|----------------------|--------------|---------------|-----|

# 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

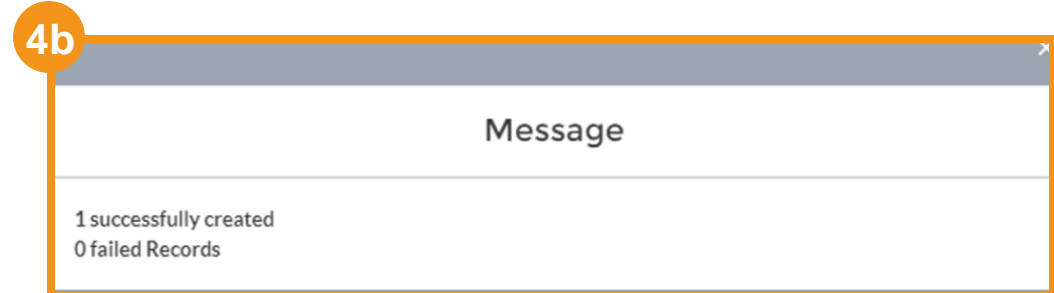
## 4 Submitting Updated Users & Attestation

(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 are 'Upload Files' and 'Or drop files' buttons, and a 'Create Users' button. A table of users is displayed below, with columns for Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License, License Type, License State, CDS, DEA, and Status. A 'Reprocess Users' button is highlighted with a blue box and labeled '5b'. Below the table, there is a section for 'Error Message' with a highlighted box and label '5a'. The error message is 'Please Provide Valide NPI'. Below this, there are input fields for 'Physician', 'Junior Smoke Test', 'Yello70', and 'Clouds70'. A scrollbar is visible at the bottom of the table area.

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User

Instructions:

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

Upload Files Or drop files Create Users

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

5b Reprocess Users

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



# Provisioning Services

# 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' with the text 'user account' entered. 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 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 and labeled '1c'. Below the contact card, there is a table with user details:

| Account Name                      | HIE Source | Phone          | Email                                 |
|-----------------------------------|------------|----------------|---------------------------------------|
| <a href="#">Junior Smoke Test</a> | CRISP-MD   | (111) 111-1111 | useraccounts@crispsharingservices.com |

At the bottom, there are tabs for 'DETAILS' and 'USER SERVICES'.

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

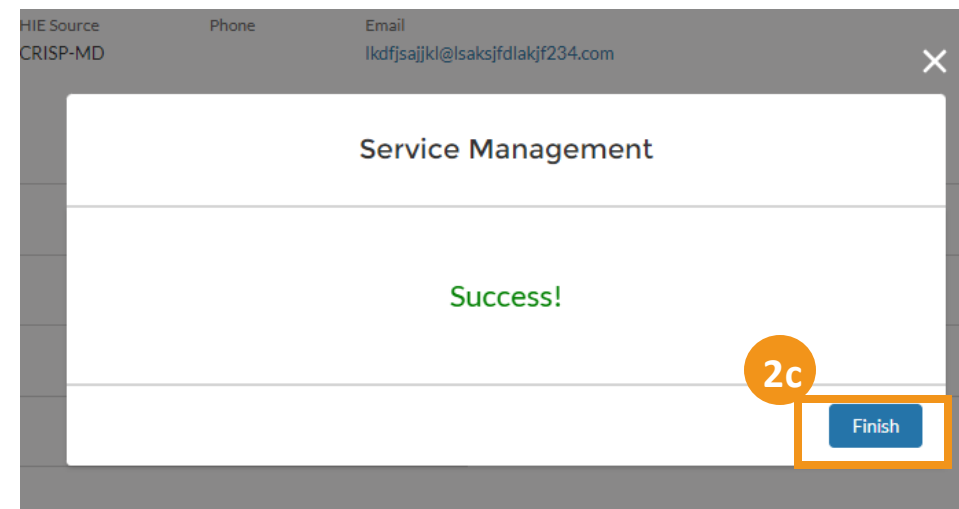
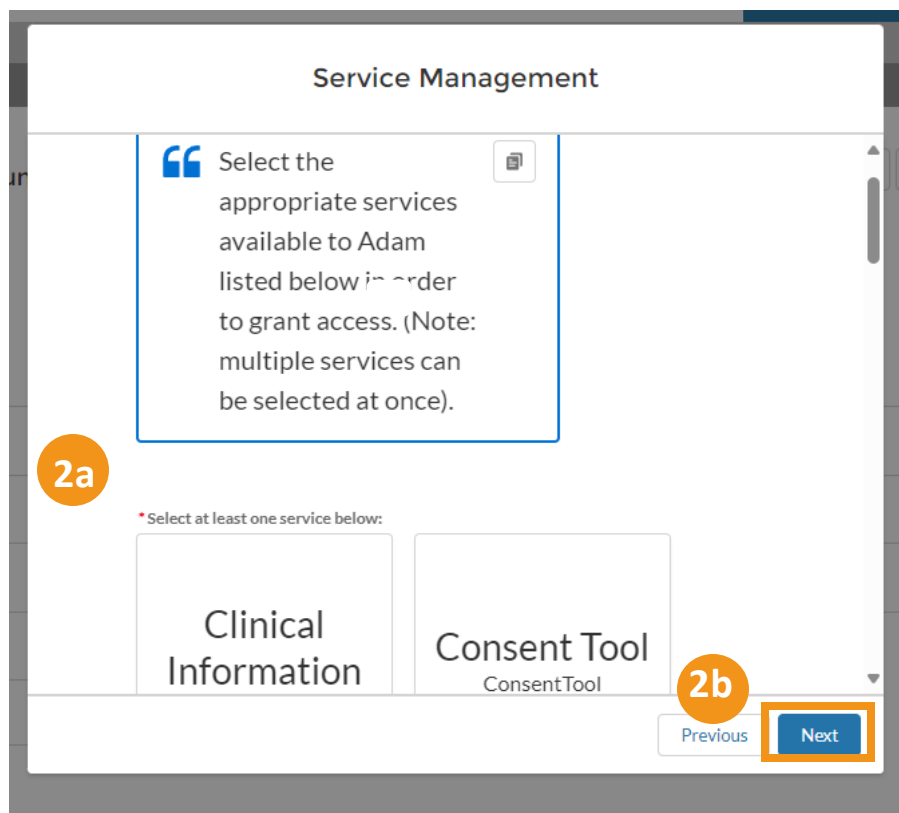
# HIE Admin User Guide – Provisioning Services: Single User

(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

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

Account  
Next Generation LLC

Website  
Industry  
Ambulatory

DETAILS PANELS **SERVICES** ACTIVE USERS SUSPENDED USERS

Account Name  
Next Generation LLC

Parent Account

Industry  
Ambulatory

# HIE Admin User Guide – Provisioning a Service: Multiple Users

## 2 Select Service

- (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.**

Account: Next Generation LLC  
Industry: Ambulatory Medical

Buttons: + Follow, User Export, New Note, Audit

Tabs: DETAILS, PANELS, **SERVICES**, ACTIVE USERS, SUSPENDED USERS

| Services   | Org Service                          | Status | Activation Date |
|--|--------------------------------------|--------|-----------------|
| <b>4a</b> CSS Event Notification Delivery (CEND) | <b>4b</b> 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](#)

Asset: Next Generation LLC - CEND

Buttons: Service Management (4c)

Account: Next Generation LLC | Contact: | Product: CSS Event Notification Delivery (CEND) | Status: Active

Tabs: DETAILS, RELATED

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

Service Management

\*Select Service Choices

Buttons: Assign Services (4d), Deactivate Services

# 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 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...            | aalnerer100chestingt... |
| 4 | <input checked="" type="checkbox"/> Aalnerer101 chestingt... | aalnerer101chestingt... |

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

**5b**



# 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!*



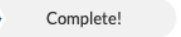
(6c) Success! You have provisioned access of a service to multiple users, Click *Finish*

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@crispharedservices.com

DETAILS USER SERVICES

CRISP-MD | lkdfjsajjkl@lsaksjfdlakjf234.com

Service Management

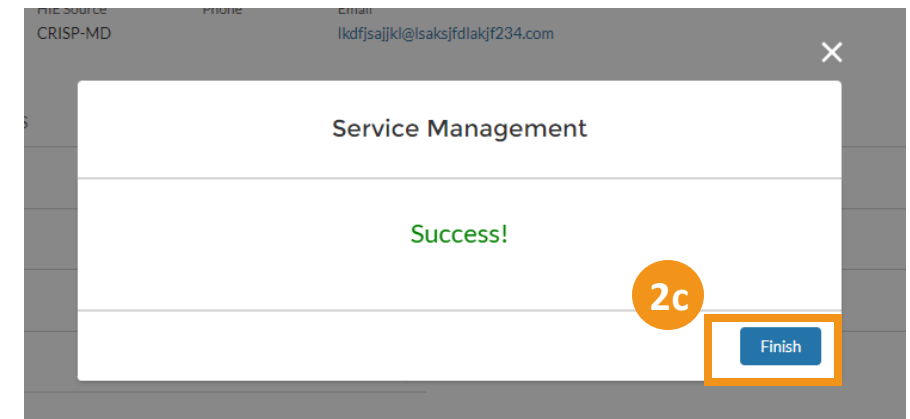
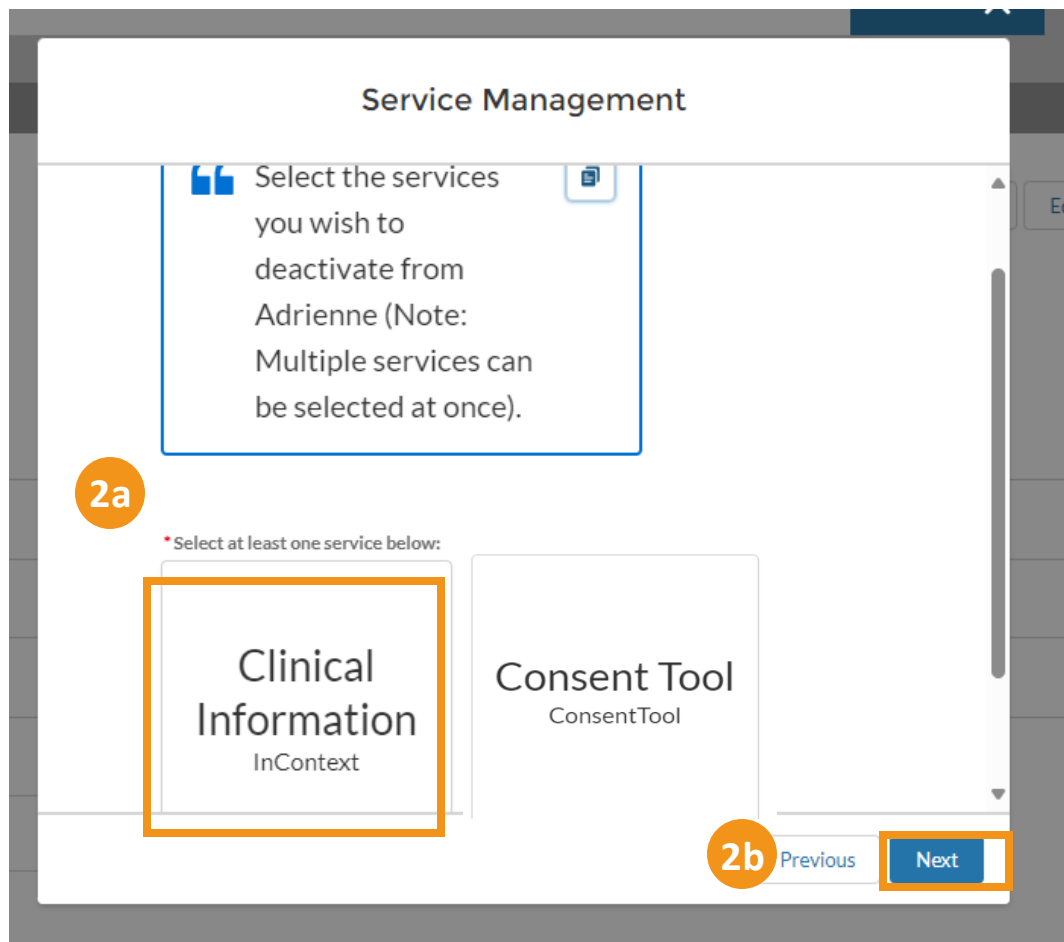
\*Select Service Choices

1d 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 the search bar and is labeled '1a'. 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, Active. At the bottom of the table are 'Previous' and 'Next' buttons and 'Page 1 of 1'. Below the table is another navigation bar with 'HOME', 'ACCOUNTS', 'ASSETS', and 'ADD USERS'.

The screenshot shows the 'HIE Admin - User Audit Page'. The title is 'Audit Account : Test Account'. Below the title 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.', 'No Selection - The user "Status" will remain the same and the Audit Date will not be updated.', and a note: 'NOTE: All users must be verified once every 90 days to maintain access.' Below the instructions is a search bar labeled 'Search' with a magnifying glass icon. An orange box highlights the search bar and is labeled '1b'. Below the search bar are two tabs: 'Active User' 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@crisp... | 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@crispshareservices.com

DETAILS USER SERVICES 1c

| 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

# 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       |

2a

[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 the asset 'Plum10 Fruit10 - Next Generation LLC - Portal'. The main dashboard shows account details, contact information, product type, status, and install date. A 'DETAILS' section provides further information about the asset name, account, and product. The 'HIE Portal User Management' pop-up window is shown in three states: (3a) with the 'HIE Portal User Management' link highlighted, (3b) with the 'Reset Password' and 'Resend Activation Link' buttons highlighted, and (3c) with the 'Confirm Reset' button highlighted. The pop-up window contains instructions for resetting the password and a 'Cancel' 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, there is a navigation bar with tabs: HOME, ACCOUNTS, **USERS** (highlighted with an orange box and labeled '1a'), ADD USERS, and USER GUIDE & HELP. Below the navigation bar, the main content area is titled 'All Contacts'. A search bar labeled 'Search Contact' is present, with the text 'user account' entered and highlighted by an orange box 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 table, 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' page in the HIE Admin User Guide. The page features a navigation bar with links for HOME, ACCOUNTS, USERS, ADD USERS, and USER GUIDE & HELP. Below the navigation bar, there is a search bar labeled 'Search Contact' with the text 'user account' entered. A table lists the contacts, with the following columns: Name, Account Name, Member Title, Email, Phone, and Status. The first row of the table is highlighted, and the 'Name' column value 'User Account' is enclosed in an orange box. A callout '2a' is positioned next to the 'Name' column header. At the bottom of the table, there are navigation buttons for '< Previous' and 'Next >', and the page number 'Page 1 of 1' is displayed in the center.

|   | 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 HIE Admin 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 modal also includes fields for Email (johndoe1234@email1234.com), Phone (2223332222), and Mobile (2223332222). At the bottom of the modal are 'Cancel', 'Save & New', and 'Save' buttons. Callout boxes '3a' and '3b' highlight the 'Edit' button and the 'Save' button, respectively.

HOME ACCOUNTS USERS ADD USERS

Contact  
Ronald Test

+ Follow Edit Assign Services

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

DETAILS RELATED

|                    |               |
|--------------------|---------------|
| Name               | Contact Owner |
| Ronald Test        | Avideon CRISP |
| Account Name       | Contact Type  |
| Jones Practice LLC |               |

Edit Contact

\* Name  
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 Save

# Bulk Export User List



# HIE Admin User Guide – Editing User Details

## 1 Choosing an Account

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

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

The screenshot displays the HIE Admin interface. At the top, a navigation bar includes 'HOME', 'ACCOUNTS', 'USERS', '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'). A toolbar on the right side of the account details contains buttons for '+ Follow', 'User Export', 'New Note', and 'Audit'. The 'User Export' button is highlighted with a red box and a red circle containing '2'. 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 shows a 'User Export' dialog box overlaid on a user management interface. The dialog box 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.' Below the text is a blue 'Export' button, which is highlighted with a red circle and the number '3'. An orange arrow points from the 'Export' button to the table of user details on the right. The table has columns for User Status, Account Name, First Name, Last Name, Email, Phone Number, Mobile Number, Member Title, Last Audit Date, and Last Login Date. The table contains 27 rows of user data.

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