Getting Started!

The Health Information Exchange (HIE) Admin Portal allows HIE Administrators to manage their colleagues’ HIE accounts. Account creation, access to specific CRISP Services, and employee turnover can all be handled via the tool.

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

HIE SUPPORT SERVICES

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

**CRISP DC:**
P: 877.952.7477
E: support@crisphealth.org

**WVHIN:**
P: 844.468.5755
E: wvhinsupport@crisphealth.org

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

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HIE Admin User Guide – Accessing the Portal

1 Logging In

Log on to https://hieportal.force.com/hieadmin to access the HIE Admin Portal.

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

After logging in, you will see the screen below. First, let’s Verify your users. Select the Accounts tab to begin.
1 Choosing an Account

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

(1b) Select “User Audit” in the top-right of your screen.
Managing Active Users

(2a) To work with Active Users, ensure the Active Users tab is selected.

(2b) Select “Approve” to continue a user’s access to tools for existing staff. If all users should be approved, you can select “Approve all” on the right side of the screen.

(2c) Select “Deny” to revoke access for individuals who are no longer employees within your organization.
(3a) Once you’ve selected Create Users, an attestation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click “Confirm”.

(3b) A pop up window will show the number of Users created and the number of failed records.
(3a) To work with suspend 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 Next to review your selections. After clicking Next, proceed to the next page.
5 Confirming an Audit

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

(4b) You have successfully managed your users.

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**HIE Admin - User Confirmation Page**

<table>
<thead>
<tr>
<th>Deactivated Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>No Record Available</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Active Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Anitra Shird</td>
</tr>
<tr>
<td>Tammy34 bobby34</td>
</tr>
</tbody>
</table>

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**Success**
All records Successfully Updated
Adding Individual Users
(1a) To provide access to HIE tools, click the “Add Users” tab at the top of the home screen.

(1b) Select an appropriate Title for the new user. A list will appear in the dropdown.
## Creating a New User

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Other Non-Licensed Staff</td>
</tr>
<tr>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td><del>None</del></td>
</tr>
<tr>
<td>State License</td>
<td><del>None</del></td>
</tr>
<tr>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>

- **Submit**
- **Cancel**
3 Submitting a New User & Attestation

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

(3b) Once you’ve completed the onboarding form, an attestation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click “Confirm”.

(3c) A green pop-up message will appear once user has been successfully onboarded.
1. Preparing the *Bulk Upload* Form

1a. Click the “Add User” button at the top of the home screen.

1b. Click the “Bulk Users” tab.

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

**Instructions:**
- Please Download Template `Bulk User Template`
- Please use Upload File button to upload users.
- Click Create Users button to create users.
- Check status column for success or error messages.
(2) Click “Upload” to select your file. Please note, the file must be saved as a .csv. All other file formats will not be accepted.
Creating Users

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

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

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

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

Confirm

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

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

### 5 Managing Unprocessed Users

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

(5b) Update the missing or incorrect information.

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

(5d) Select “Create Users”.

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

- **Create Users**

<table>
<thead>
<tr>
<th>Action</th>
<th>Error Message</th>
<th>Title</th>
<th>Organization</th>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>Please Provide Valide NPI</td>
<td>Registered Nurse</td>
<td>Jones Practice LLC</td>
<td>Tammy20</td>
</tr>
<tr>
<td></td>
<td>Please Provide Valide NPI</td>
<td>Registered Nurse</td>
<td>Jones Practice LLC</td>
<td>Tammy21</td>
</tr>
</tbody>
</table>
(6a) Once you’ve selected Create Users, an attestation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click “Confirm”.

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

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

HIE Admin - User Audit Page

**Audit Account: Test Account**

- **Approve**: Keeps the user(s) Active and updates their Audit Date to today.
- **Deny**: Deactivates the user(s) and they will no longer be displayed on your audit page.
- **No Selection**: The user “Status” will remain the same and the Audit Date will not be updated.

**NOTE**: All users must be verified once every 90 days to maintain access.
Editing User Details
Choosing an Account

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

(1b) Select “Related” to view users listed with the Account.
(2a) Choose the Contact you would like to view by clicking on the Contact Name.

(2b) Select “View All” if your contact is not on the initial list.
(3a) Select “Edit” to update the contact’s information.

(3b) Select “Save” to confirm the updated information.
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.

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

Active User: A User who has access to HIE Tools, for example ULP.

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