Getting Started!

The Health Information Exchange (HIE) Admin Tool allows HIE Administrators to manage their colleagues’ HIE accounts. User account creation, access to specific HIE 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 Tool.

HIE SUPPORT SERVICES

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

CRISP DC:
P: 833.580.4646
E: support@crisphealth.org

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

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

healtheConnect Alaska:
P: 907-770-2626
E: support@ak-ehealth.org

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Accessing the Tool
**HIE Admin User Guide – Accessing the Tool**

1. **Logging In**

   **First Time 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 Users:**

   - **MD or DC users** – Log on to [https://hieportal.force.com/hieadmin](https://hieportal.force.com/hieadmin) to access the HIE Admin Tool.
   - **CT users** – Log on to: Connie Portal [https://portal.conniect.org](https://portal.conniect.org) → “HIE Admin Tool”
   - **AK users** – Log on to: healtheHUB Portal [https://hub.healtheconnectak.org/](https://hub.healtheconnectak.org/) → “HIE Admin Tool”

   **(1a) After logging in**, you will see the screen below. First, let’s Verify your users. Select the Accounts tab to begin.
Managing Existing Users
1 Choosing an Account

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

(1b) Select *Audit* in the top-right of your screen.
(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 All 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”
(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.
Confirming an Audit

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

(4b) You have successfully managed your users.
Adding Individual Users
**Selecting a Title**

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

2. Select an appropriate Title for the new user. A list will appear in the dropdown.

<table>
<thead>
<tr>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancer Registrar</td>
</tr>
<tr>
<td>Certified Nurse Midwife</td>
</tr>
<tr>
<td>Clinical Pharmacist</td>
</tr>
<tr>
<td>Dentist</td>
</tr>
<tr>
<td>Licensed Clinical Social Worker</td>
</tr>
<tr>
<td>LTC Consultant Pharmacist</td>
</tr>
<tr>
<td>Medical Assistant</td>
</tr>
<tr>
<td>Nurse Practitioner</td>
</tr>
<tr>
<td>Nursing Home Administrator</td>
</tr>
<tr>
<td>Nursing Home Other Staff</td>
</tr>
<tr>
<td>Other Licensed Healthcare Practitioner</td>
</tr>
<tr>
<td>Other Non-Licensed Staff</td>
</tr>
</tbody>
</table>
2a) Complete the following fields. Keep in mind that all fields marked with asterisks * are required.

NOTE: *User Type – select “Portal” if you are an HIE Admin in CT, WV or AK; select Unified Landing Page if you are an HIE Admin in MD or DC
(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.
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.

(1d) Select User Type - **NOTE:** User Type – select “Portal” if you are an HIE Admin in WV, CT, AK; select Unified Landing Page if you are an HIE Admin in MD or DC.

**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.

**Table:**
- [Title]
- [Organization]
- [First Name]
- [Last Name]
- [Email]
- [Phone]
- [Department]
- [NPI]
- [Professional License]
- [License Type]
- [License State]
- [CDS]
(2a) Click **Upload Files** to select your file. Please note, the file must be saved as a .csv. All other file formats will not be accepted.

**2a** Upload Files

**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.
Adding Multiple Users

Creating Users

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

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.
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.

Message

1 successfully created
0 failed records
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.
User Search
1. Locating a User

1a) Enter User’s first name, last name or email address in the search bar at the top of any page

1b) Search by data in any column in the Users tab

1c) Enter the User’s first or last name in the search bar in the User Audit Page
Editing User Details
Choosing an Account

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

(1b) Select **ACTIVE USERS** or **SUSPENDED USERS** tab to view users listed with the Account.
2 Viewing and Selecting a Contact

(2a) Choose the Contact (User) 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.
Viewing Account Services
View Account Services

1. Select Accounts tab.
2. Click on an Account Name.
3. Select Services tab to view a list of services associated with the account. Description of services under development.
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, for example ULP.

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