Getting Started!

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

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

HIE Technical User Support Team

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P: 877.952.7477  
E: support@crisphealth.org

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P: 833.580.4646  
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P: 844.468.5755  
E: wvhinsupport@crisphealth.org

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

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P: 907-770-2626  
E: help@ak-ehealth.org

Updated August 17th, 2022
# Table of Contents

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIE Support Service</td>
<td>1</td>
</tr>
<tr>
<td>Accessing the Tool</td>
<td>3</td>
</tr>
<tr>
<td>Tool Overview</td>
<td>5</td>
</tr>
<tr>
<td>Managing Existing Users</td>
<td>7</td>
</tr>
<tr>
<td>Creating Individual Users</td>
<td>12</td>
</tr>
<tr>
<td>Creating Multiple Users</td>
<td>17</td>
</tr>
<tr>
<td>User Search</td>
<td>23</td>
</tr>
<tr>
<td>Viewing Account Services</td>
<td>25</td>
</tr>
<tr>
<td>Provisioning Services</td>
<td>27</td>
</tr>
<tr>
<td>Password Reset</td>
<td>34</td>
</tr>
<tr>
<td>Editing User Details</td>
<td>38</td>
</tr>
<tr>
<td>Glossary</td>
<td>42</td>
</tr>
</tbody>
</table>
Accessing the Tool
**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:**

- **MD ULP users** – Log on to [https://hieportal.force.com/hieadmin](https://hieportal.force.com/hieadmin) to access the HIE Admin Tool
- **MD HIE Portal users** – Log on to: [https://portal.crisphealth.org](https://portal.crisphealth.org) → “HIE Admin Tool”
- **DC ULP users** – Log on to: [https://hieportal.force.com/hieadmin](https://hieportal.force.com/hieadmin) to access the HIE Admin Tool
- **DC HIE Portal users** – Log on to: [https://portal.crispdc.org](https://portal.crispdc.org) → “HIE Admin Tool”
- **WV users** – Log on to: [https://portal.wvhin.org](https://portal.wvhin.org) → “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.healthconnectak.org/](https://hub.healthconnectak.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
Tool Overview
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.
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.
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
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.
HIE Admin User Guide – Managing Existing Users

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 30 days will be deactivated. If a suspended User is approved, remind the User to reset their password if unable to log in.

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<th>Name</th>
<th>Email</th>
<th>Member Title</th>
<th>Department</th>
<th>Audit Date</th>
<th>Audit By</th>
</tr>
</thead>
<tbody>
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<td></td>
<td>Laughter Ajibade</td>
<td><a href="mailto:laughter@test.com">laughter@test.com</a></td>
<td>Nurse Practitioner</td>
<td></td>
<td>2021-03-16</td>
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<td><a href="mailto:shay@test.com">shay@test.com</a></td>
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<td></td>
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<tr>
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<td></td>
<td>2021-03-18</td>
<td>2021-03-18</td>
</tr>
</tbody>
</table>

Complete Audit
Confirming an Audit

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

(4b) You have successfully managed your users
Creating 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

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.
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” if you are an HIE Admin in CT, WV, AK or DC and MD if you have migrated to the new HIE Portal; select Unified Landing Page if you are an HIE Admin in MD or DC and your organization has not migrated to HIE Portal*

<table>
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<td>Title</td>
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<td>*Organization</td>
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</tr>
<tr>
<td>– None --</td>
<td></td>
</tr>
<tr>
<td>*User Type</td>
<td></td>
</tr>
<tr>
<td>– None --</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Email</td>
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<td>Department</td>
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<tr>
<td>– None --</td>
<td></td>
</tr>
<tr>
<td>State License</td>
<td></td>
</tr>
<tr>
<td>– None --</td>
<td></td>
</tr>
</tbody>
</table>
(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.
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.

Guidance: Search for the User in accounts that you manage – see User Search section. If the User does not exist in an account you manage, you have the option to use a different email address (prefer an email address from your organization) or call HIE Technical User Support Team.
Creating 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. User Type – select “Portal” if you are an HIE Admin in CT, WV, AK or DC and MD if you have migrated to the new HIE Portal; select Unified Landing Page if you are an HIE Admin in MD or DC and your organization has not migrated to HIE Portal.
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.

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.
Creating Users

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Organization</th>
<th>First Name</th>
<th>Last Name</th>
<th>PDMP Specialty</th>
<th>Email</th>
<th>Phone</th>
<th>Department</th>
<th>NPI</th>
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<tr>
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<td>Rebecca</td>
<td>Tucker</td>
<td></td>
<td><a href="mailto:r.tucker@randatmail.com">r.tucker@randatmail.com</a></td>
<td></td>
<td>Emergency Medicine</td>
<td></td>
<td></td>
</tr>
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<td>Jordan</td>
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<td></td>
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</tr>
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<td>Williams</td>
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<td></td>
<td>Family Medicine</td>
<td>1457350365</td>
<td>17166</td>
</tr>
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</table>
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.
Locating a User

Search for Users in any account you manage:
(1a) Enter User’s first name, last name or email address in the search bar at the top of any page OR
(1b) Search by data in any column in the Users tab: Name, Member Title, Account Name, Email, User Status

Search for Users within the User Audit Page
(1c) Enter the User’s first or last name in the search bar
Viewing Account Services
**View Account Services**

1a. Select **Accounts** tab

1b. Click on an Account Name

1c. Select **Services** tab to view a list of services associated with the account available for provisioning to Users.

Note: See Glossary for link to services and descriptions.

---

**Account: Next Generation LLC**

<table>
<thead>
<tr>
<th>Details</th>
<th>Panels</th>
<th>Services</th>
<th>Active Users</th>
<th>Suspended Users</th>
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<td>HIE Portal</td>
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<td>Next Generation LLC - Portal</td>
<td>Active</td>
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<tr>
<td>Clinical Information</td>
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<td>Next Generation LLC - InContext</td>
<td>Active</td>
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<td>Referrals</td>
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<td>Active</td>
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</tr>
<tr>
<td>Snapshot</td>
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<tr>
<td>Clinical</td>
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<tr>
<td>Encounter Notification System (ENS)</td>
<td></td>
<td>Next Generation LLC - ENS</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>
*Provisioning Services

*Users accessing CRISP via the Unified Landing Page (ULP) cannot provision services. Only HIE Admin with access to the HIE Portal can provision services.
1. 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)

(1a) Select the Account associated with the Users who need access to a service

(1b) Select Services tab
(2a) Identify service name in the "Service" column
Note: See Glossary for link to the Services and Descriptions resource
(2b) Click on the Org Service blue hyperlink (next to the Service) you would like to provision to Users
(2c) Click Assign Service

<table>
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<tr>
<th>Service</th>
<th>Org Service</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>HIE Portal</td>
<td>Next Generation LLC - Portal</td>
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</tr>
<tr>
<td>Clinical Information</td>
<td>Next Generation LLC - InContext</td>
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</tr>
<tr>
<td>Referrals</td>
<td>Next Generation LLC - ReferralUI</td>
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<tr>
<td>Prescriber Reports</td>
<td>Next Generation LLC - PrescriberReports</td>
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<td>COVID-19 Lab Tools</td>
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<td>Snapshot</td>
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<tr>
<td>Unified Landing Page (ULP)</td>
<td>Next Generation LLC - ULP</td>
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</tr>
<tr>
<td>Encounter Notification System (ENS)</td>
<td>Next Generation LLC - ENS</td>
<td>Active</td>
</tr>
</tbody>
</table>
Select Access/Users

3. Select Access/Users

Select how your users will access this service.

3a. Select HIE Portal
(3b) Click Select Users
(3c) Select the User(s) you are granting access this service by checking the box next to their name
(3d) Click Confirm Selections
Confirm Selections:
(4a) Review and confirm list of users who should access this service
(4b) click Complete!
(4c) Success! You have provisioned access of a service to multiple users, Click Finish
Provisioning a service to a single User

(5a) Access the active User using the search bar at the top of any page or through the Users tab.
(5b) Click on the User’s name.
(5c) Click Assign Services in the top right corner.

HIE Admin User Guide – Provisioning Services: Single User
6 Assign Services

(6a) Assign Services: Select Service (note: only one service may be selected at a time), Click Next
(6b) Select Access: Select how User will access this service (Choose HIE Portal unless otherwise notified), Click Next
(6c) Click Finish

**Repeat steps 6a-6c for assigning each service, only one service may be provisioned at a time

Note: See Glossary for link to services and descriptions.
Password Reset

*Users accessing CRISP via the Unified Landing Page (ULP) cannot reset password. Only HIE Admin with access to the HIE Portal can reset password.
User HIE Portal password can be reset in the HIE Admin Tool

(1a) Search for User
(1b) Click on User’s name
(1c) Click on User Services tab
(1d) Click View All to expand view
HIE Portal – Password Reset

2 User Password Reset

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

User Password Reset

(3a) Click on HIE Portal User Management

(3b) Read the instructions then click on Confirm Reset
Editing User Details
(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
**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.

**Description of Services:** A full list of services with descriptions available to HIE Administrators is located <here>

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