# 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.



Updated November 2024

# Table of Contents

# Tool Overview

# 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.

**Encounter Notification:** An encounter notification supports continuity of patient care by alerting a patient care provider/payer of medical activity for one of their patients that occurred at a different care provider. They can utilize notifications to provide follow-up care or allocate a specific resource to that patient. Notifications are triggered by ADT, EMS, and VSA (death) data. Other data triggers are expected to be supported.

**Population Explorer:** User-friendly interface for reviewing patients' encounters through **CSS Event Notification Delivery (CEND)**, providing access to the latest encounters and at least six months of encounter history.

**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

# 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



**1a**

HOME    ACCOUNTS    USERS    ADD USERS

**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.

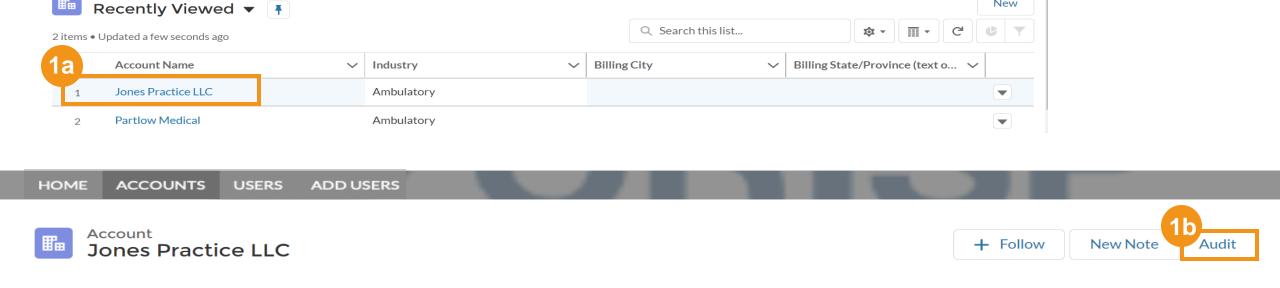# HIE Admin User Guide – Managing Existing Users

**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

# 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 |
|--------|------|-------|--------------|------------|------------|----------|
| **2b** Approve   Deny | HIE AdminEmail | mpartlow@avideon.com | | | | |
| Approve **2c** Deny | Juan Gonzalez | | | | | |

**2d** Complete Audit    Cancel    11

# HIE Admin User Guide – Managing Existing Users

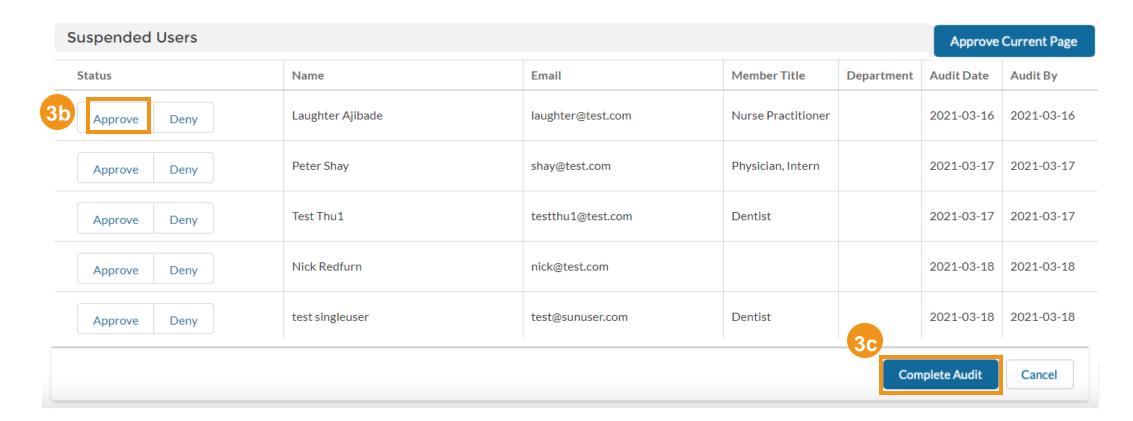**3** **Managing Suspended Users**

(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

# Creating Individual Users

# 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

# 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"*

# HIE Admin User Guide – Adding Individual Users

(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*
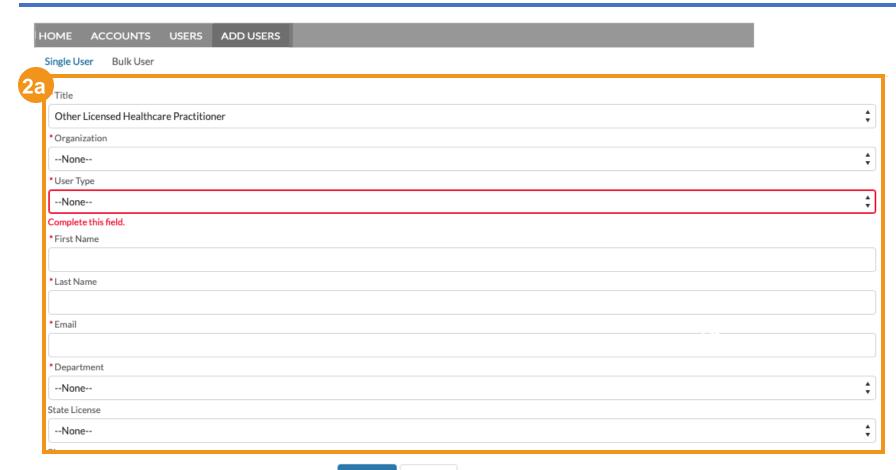
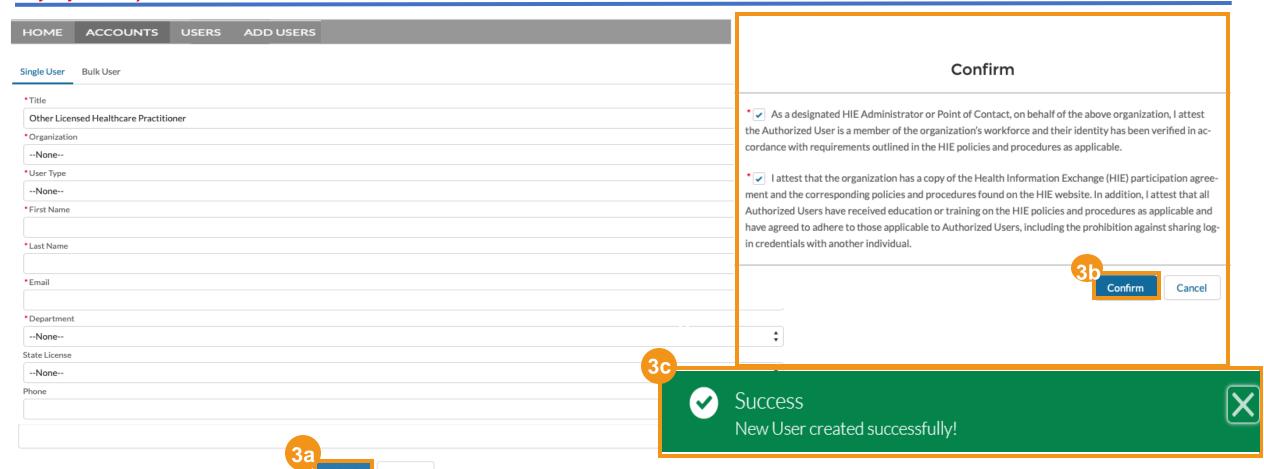**3** **Submitting a New User & Attestation**

(3c) A green pop-up message will appear once User has been successfully onboarded (see next slide for error guidance)
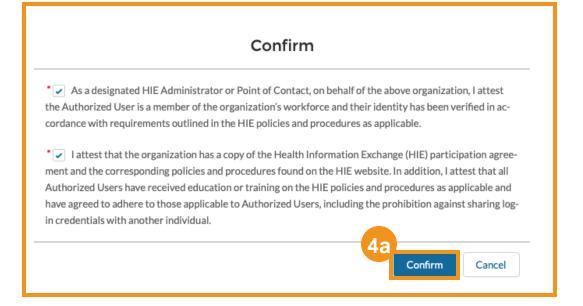
*NOTE: It is highly recommended adding the User's organizational email.  Personal emails are discouraged. After user creation, Email, First Name, Middle Name, and NPI cannot be modified for security reasons.*
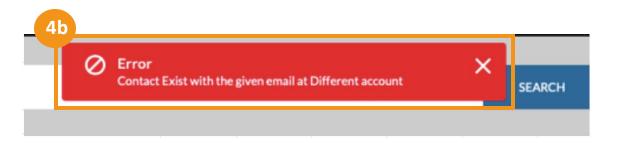
# HIE Admin User Guide – Adding Individual Users

**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** Confirm  Cancel

**4b**

⊘ Error
Contact Exist with the given email at Different account  ✕

SEARCH

# Creating Multiple Users
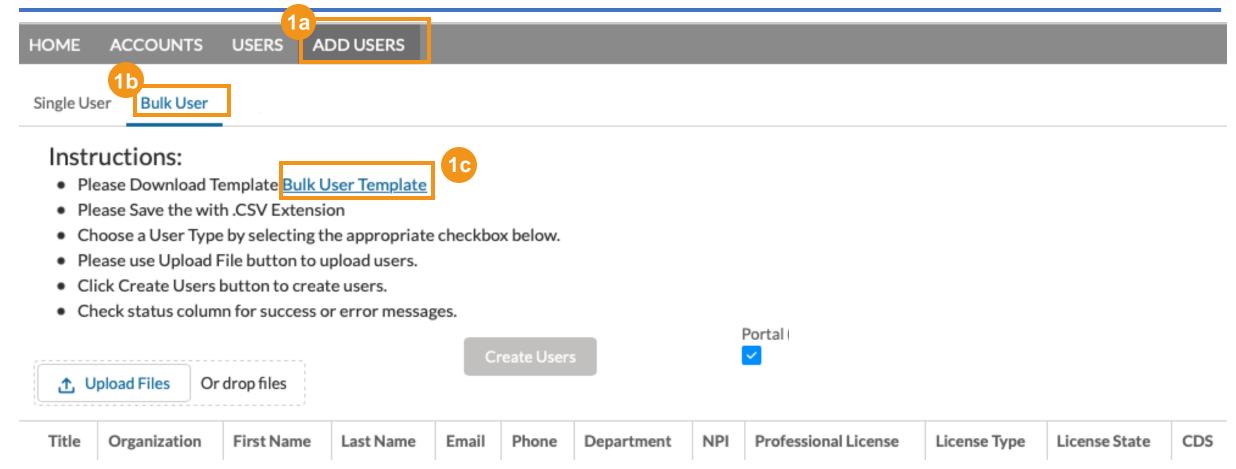
# HIE Admin User Guide – Adding Multiple Users

**1**  **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    **1a** ADD USERS

**1b** Single User    Bulk User

Instructions:
- Please Download Template **1c** 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

Create Users

⬆ Upload Files    Or drop files

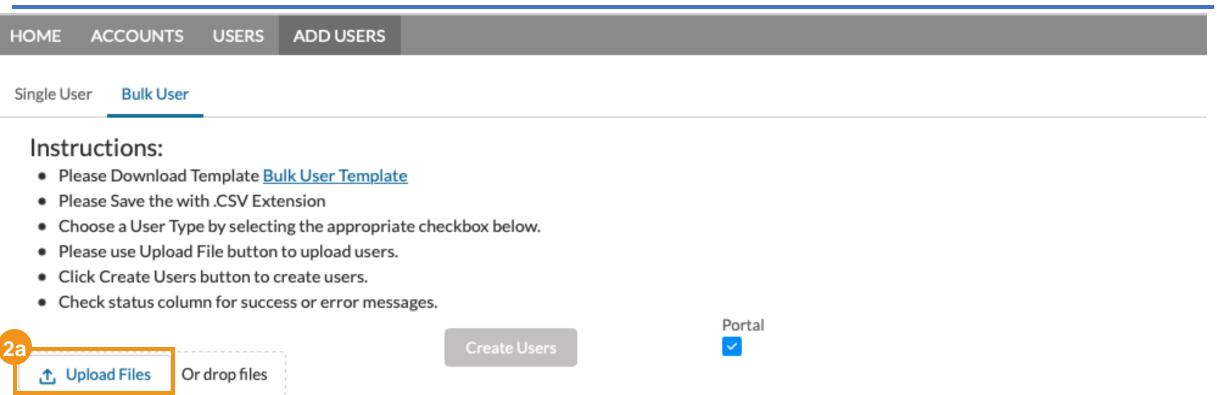| Title | Organization | First Name | Last Name | Email | Phone | Department | NPI | Professional License | License Type | License State | CDS |
|-------|--------------|------------|-----------|-------|-------|------------|-----|----------------------|--------------|---------------|-----|

# 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.

Portal ☑

Create Users

**2a** ⬆ Upload Files    Or drop files

| 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.

Portal
☑

**3a**  Create Users

⬆ Upload Files    Or drop files

| 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

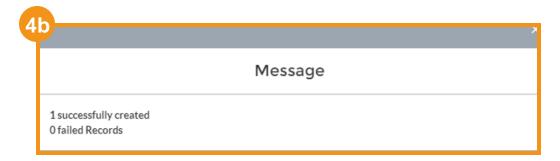**4** **Submitting Updated Users & Attestation**

(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*
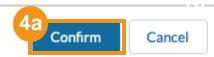
(4b) A pop up window will show the number of Users created and the number of failed records

## 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 log-in credentials with another individual.
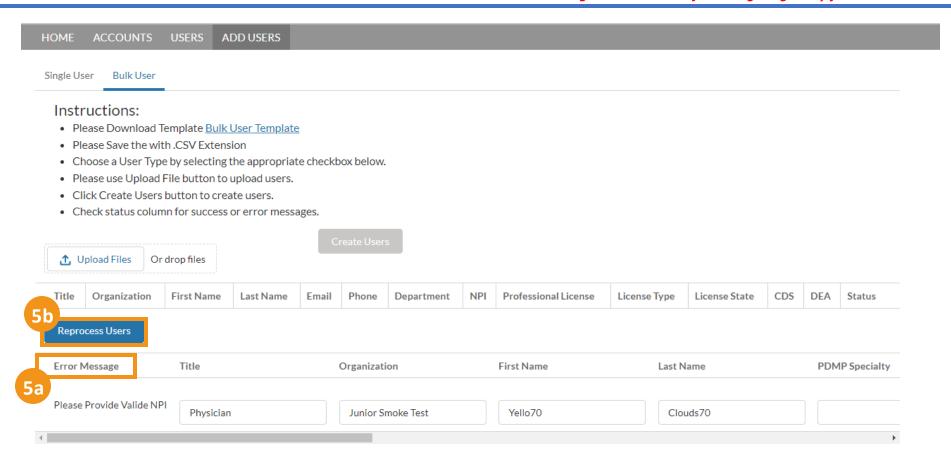
**4a** Confirm   Cancel

**4b**

### Message

1 successfully created
0 failed Records

# 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 <u>uncorrected</u> 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*

# 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
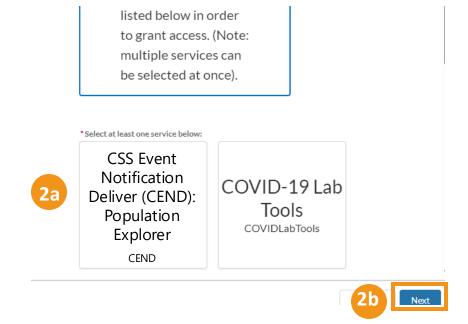(1c) Select *Service Management*
(1d) Select *Assign Services*

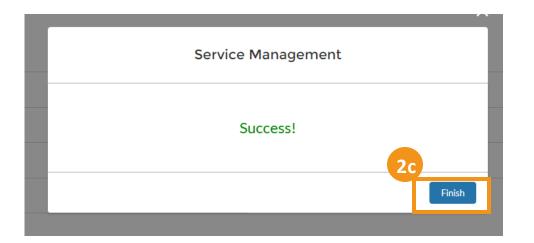# HIE Admin User Guide – Provisioning Services: Single User

**2** **Assign Services**

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

listed below in order to grant access. (Note: multiple services can be selected at once).

**2a**

*Select at least one service below:

CSS Event Notification Deliver (CEND): Population Explorer

CEND

COVID-19 Lab Tools

COVIDLabTools

**2b** Next

Service Management

Success!

**2c** Finish

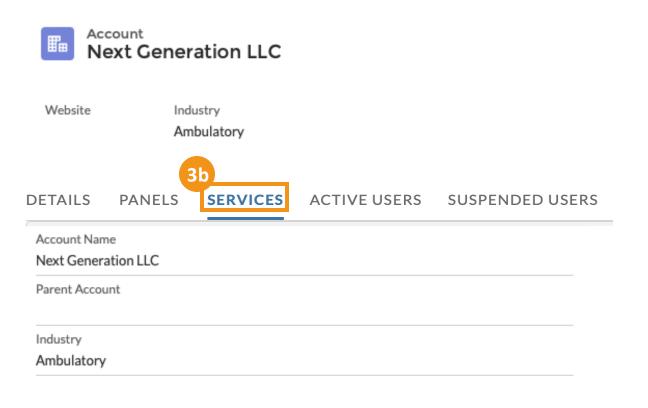# HIE Admin User Guide – Provisioning a Service: Multiple Users

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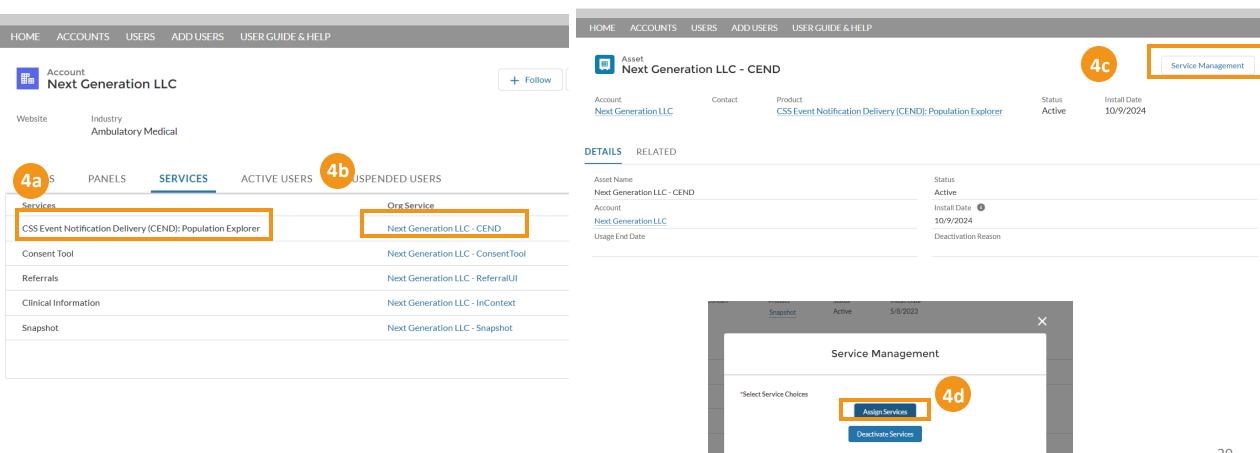
# HIE Admin User Guide – Provisioning a Service: Multiple Users

**(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 event notifications by CSS Event Notification Delivery (CEND), then provisioning CEND to your users will give them Population Explorer Access.*
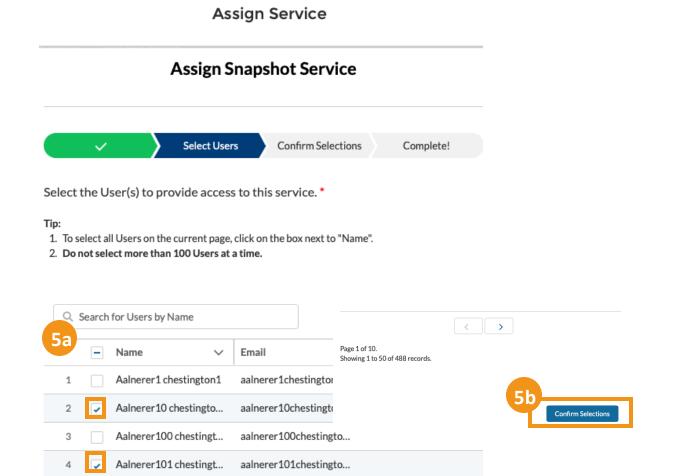
**2** **Select Service**

---

HOME   ACCOUNTS   USERS   ADD USERS   USER GUIDE & HELP

Account
**Next Generation LLC**

+ Follow

Website        Industry
               Ambulatory Medical

**4a**   PANELS   **SERVICES**   ACTIVE USERS   **4b** USPENDED USERS

| Services | Org Service |
|---|---|
| CSS Event Notification Delivery (CEND): Population Explorer | Next Generation LLC - CEND |
| Consent Tool | Next Generation LLC - ConsentTool |
| Referrals | Next Generation LLC - ReferralUI |
| Clinical Information | Next Generation LLC - InContext |
| Snapshot | Next Generation LLC - Snapshot |

---

HOME   ACCOUNTS   USERS   ADD USERS   USER GUIDE & HELP

Asset
**Next Generation LLC - CEND**

**4c**   Service Management

| Account | Contact | Product | Status | Install Date |
|---|---|---|---|---|
| Next Generation LLC | | CSS Event Notification Delivery (CEND): Population Explorer | Active | 10/9/2024 |

**DETAILS**   RELATED

Asset Name                                    Status
Next Generation LLC - CEND                    Active

Account                                       Install Date ⓘ
Next Generation LLC                           10/9/2024

Usage End Date                                Deactivation Reason

Contact   Product   Status   Install Date
          Snapshot  Active   5/8/2023

**Service Management**

✕

*Select Service Choices        **4d**

Assign Services

Deactivate Services

29

# 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 name to their name
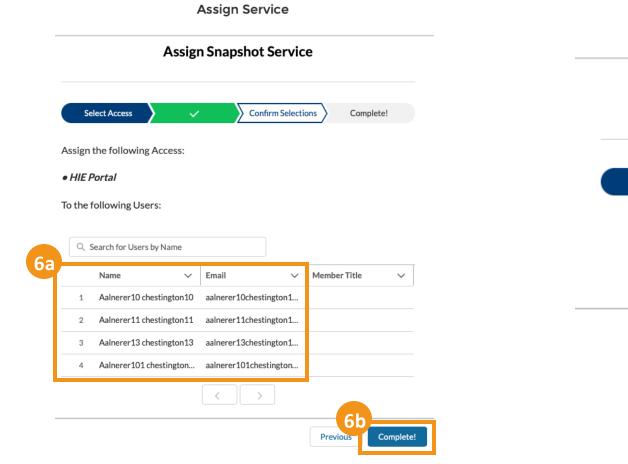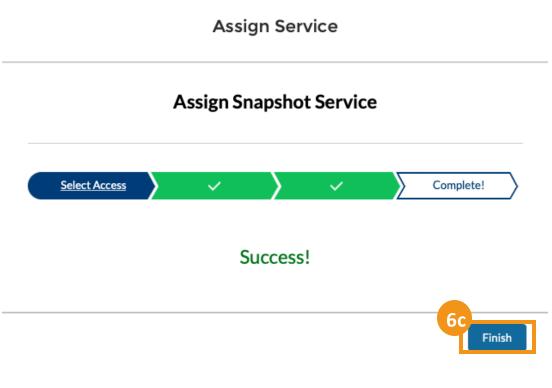(5b) Click *Confirm Selections*

# 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*

# 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
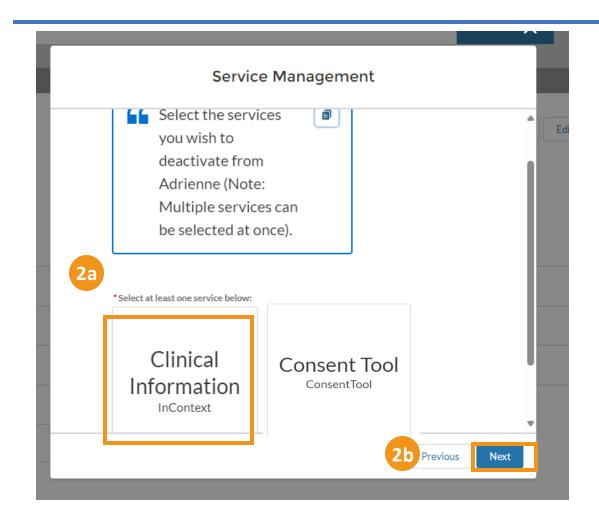(1c) Click *Service Management*
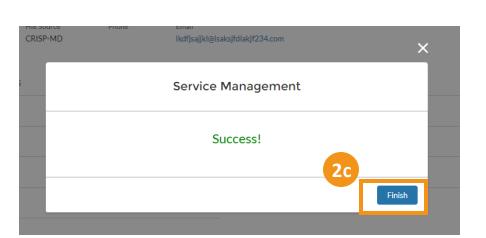(1d) Click *Deactivate Services*

**2** **Deactivating a service for a single User**

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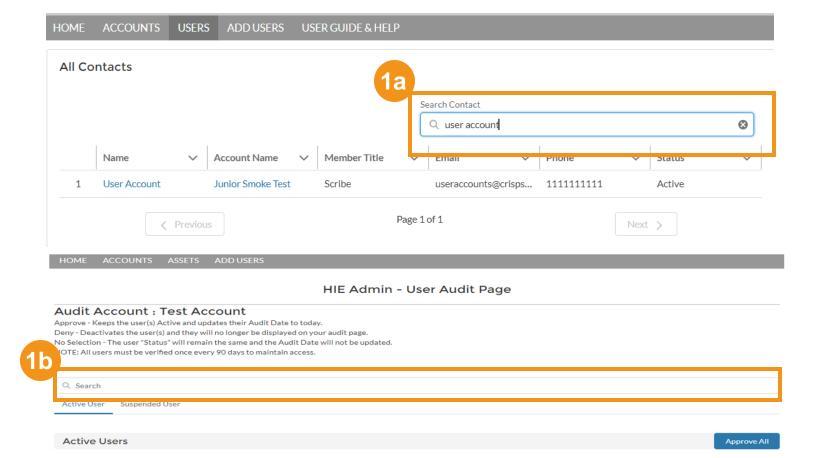(2b) Click *Next*
(2c) Click *Finish*

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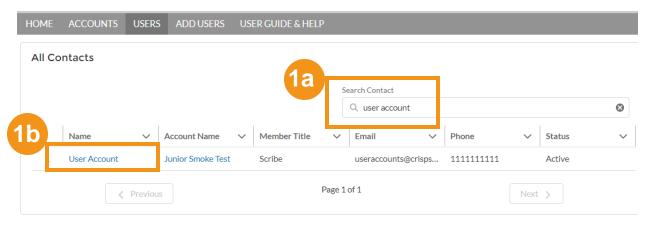(1b) Enter the User's first or last name in the search bar
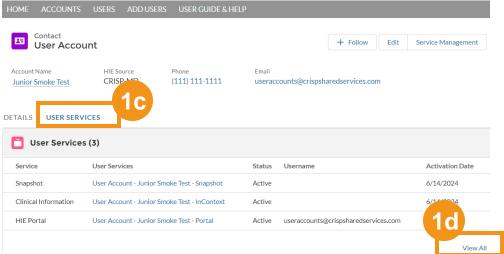


**1a**

# 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

# HIE Portal – Password or Activation Email Reset

**2** **User Password or Activation Email Reset**

DETAILS    **USER SERVICES**

## User Services (3)

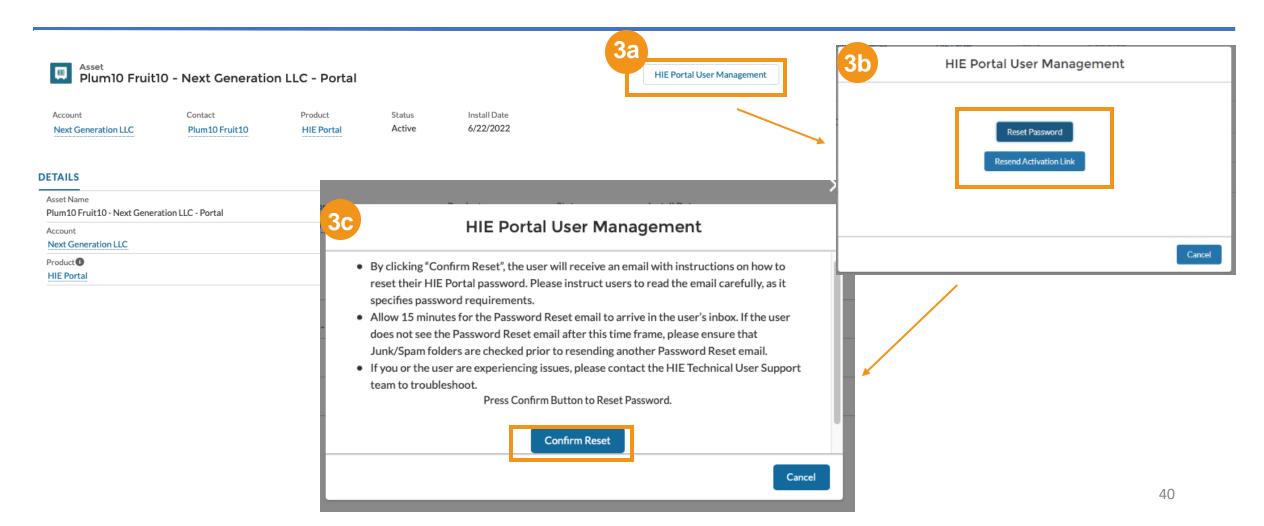| Service | User Services | Status | Username | Activation Date |
|---|---|---|---|---|
| Snapshot | User Account - Junior Smoke Test - Snapshot | Active | | 6/14/2024 |
| Clinical Informati... | User Account - Junior Smoke Test - InContext | Active | | 6/14/2024 |
| HIE Portal | **2a** User Account - Junior Smoke Test - Portal | Active | useraccounts@crispsharedservices.com | 6/14/2024 |

View Less

# HIE Portal – Password or Activation Email Reset

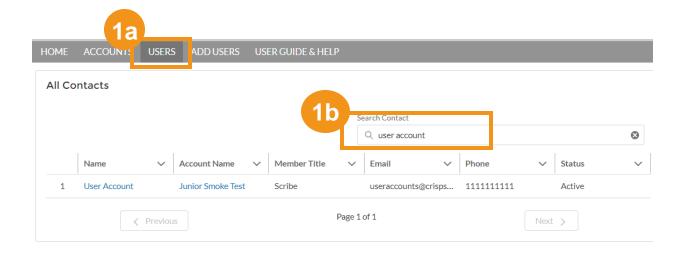**3** **User Password or Activation Email Reset**

(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*



**3a**

HIE Portal User Management

**3b** HIE Portal User Management

Reset Password

Resend Activation Link

Cancel

Asset
Plum10 Fruit10 - Next Generation LLC - Portal

| Account | Contact | Product | Status | Install Date |
|---|---|---|---|---|
| Next Generation LLC | Plum10 Fruit10 | HIE Portal | Active | 6/22/2022 |

**DETAILS**

Asset Name
Plum10 Fruit10 - Next Generation LLC - Portal

Account
Next Generation LLC

Product ⓘ
HIE Portal

**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

# HIE Admin User Guide – Editing User Details

**2** **Viewing and Selecting a Contact**

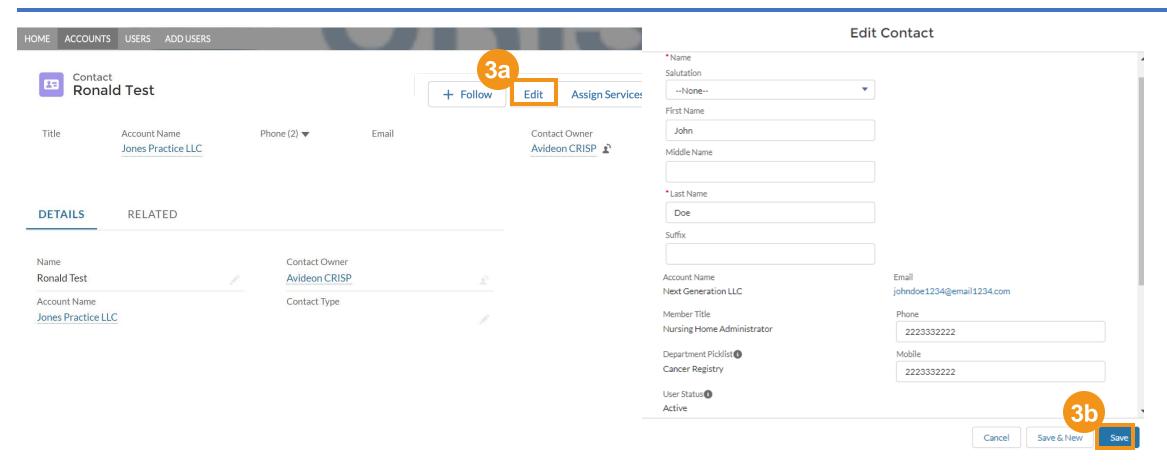(2a) Choose the Contact (User) you would like to view by clicking on the Contact Name

# HIE Admin User Guide – Editing User Details

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

**3** **Editing and Saving a Contact**

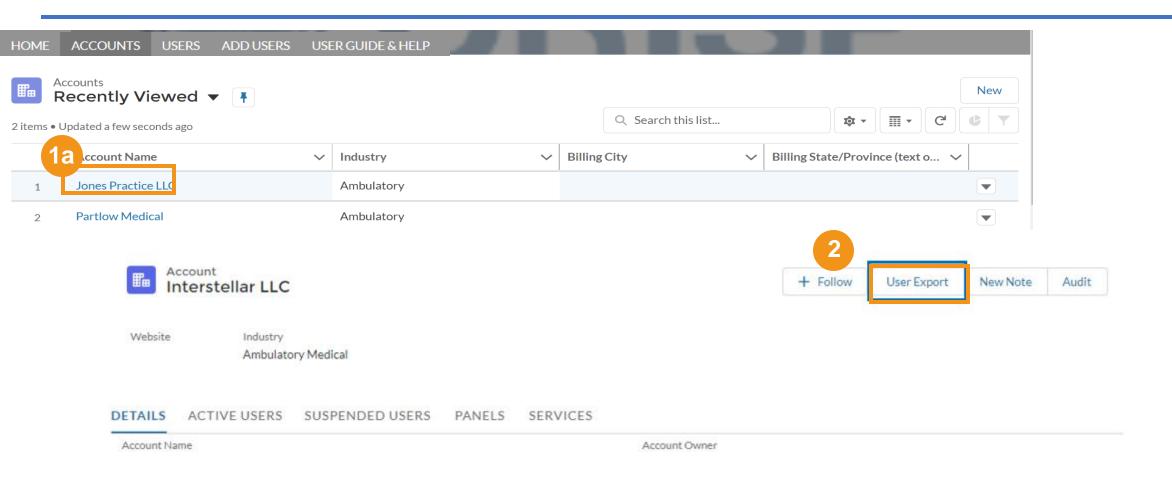**(3b)** Select *Save* to confirm the updated information

*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.*

# 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



HOME   ACCOUNTS   USERS   ADD USERS   USER GUIDE & HELP

Accounts
**Recently Viewed** ▼

New

2 items • Updated a few seconds ago

| **1a** ccount Name | ∨ | Industry | ∨ | Billing City | ∨ | Billing State/Province (text o... | ∨ |
|---|---|---|---|---|---|---|---|
| 1 | Jones Practice LLC | | Ambulatory | | | | ▼ |
| 2 | Partlow Medical | | Ambulatory | | | | ▼ |

**2**

Account
**Interstellar LLC**

+ Follow    User Export    New Note    Audit

Website        Industry
               Ambulatory Medical

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.