





Adding & Credentialing New CRS Users

Steps for HIE Admins and CRS POCs

Overview

This document covers the joint steps required by HIE Admins and CRS POCs to add and credential new users for CRS

- General Workflow for Obtaining Access to Portal & CRS
- Accessing HIE Admin Tool for the First Time (For HIE Admins)
- HIE Admin Tool – Creating Individual Users
- HIE Admin Tool – Provisioning Services
- CRS Reports Role Manager – Creating and Credentialing CRS Users
- HIE Admin Auditing of CRS Users
- Reports Role Manager and HIE Admin Tool – Key Terms and Definitions

General Workflow for Obtaining Access to Portal & CRS



● General Workflow for Obtaining Access to Portal & CRS

- Admin Roles Required to Grant Access to CRS
 - HIE Admin
 - CRS POC
- General Workflow
 - **STEP 1:** HIE Admin creates a **new CRISP Portal** account and assigns the “**Reports**” service, via the HIE Admin Tool.
 - **STEP 2:** CRS POC adds and credentials the new user for access to CRS Reports, via the **Reports Role Manager** application

Accessing HIE Admin Tool for the First Time (For HIE Admins)

Adding & Credentialing New CRS Users

HIE Admin– 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: <https://portal.crisphealth.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



WELCOME!

User Verification Process

HIE Admin Tool – Creating Individual Users

1 Selecting a Title

HIE Admin– Adding Individual Users

(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 shows the 'ADD USERS' tab selected in the top navigation bar. Below the navigation bar, there are two options: 'Single User' (underlined) and 'Bulk User'. A red box highlights the 'Single User' option, with annotation 1b pointing to it. Below this, there is a dropdown menu for 'Title' with '-None-' selected. A red box highlights the dropdown menu, with annotation 1c pointing to it. Below the dropdown menu, there is a red error message: 'Complete this field.' At the bottom of the form, there are 'Submit' and 'Cancel' buttons. A separate dropdown menu is shown below the main form, with annotation 1c pointing to it. This dropdown menu lists various titles: '-None-' (selected), 'Cancer Registrar', 'Certified Nurse Midwife', 'Clinical Pharmacist', 'Dentist', 'Licensed Clinical Social Worker', 'LTC Consultant Pharmacist', 'Medical Assistant', and 'Nurse Practitioner'.

1a

1b

1c

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User

*Title

-None-

Complete this field.

Submit Cancel

1c

✓ -None-
Cancer Registrar
Certified Nurse Midwife
Clinical Pharmacist
Dentist
Licensed Clinical Social Worker
LTC Consultant Pharmacist
Medical Assistant
Nurse Practitioner

2 Creating a New User

HIE Admin– Adding Individual Users

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

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

*NOTE: *User Type – select “Portal”*

3 Submitting a New User & Attestation

HIE Admin– 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*

(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.

HOME ACCOUNTS **USERS** ADD USERS

Single User Bulk User

* Title
Other Licensed Healthcare Practitioner

* Organization
--None--

* User Type
--None--

* First Name

* Last Name

* Email

* Department
--None--

State License
--None--

Phone

3a

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.

3b

3c



Success

New User created successfully!



HIE Admin Tool – New CRISP Portal Accounts

A Note About New CRISP Portal Account Activation:

- New Portal users will receive a CRISP Portal registration link from “donotreply@hmetrix.com” with the subject line “**Account Activate**”
- Registration links are initially valid for **72hrs**
- For support with new CRISP Portal accounts or to request a new registration link, please contact **CRISP Technical User Support:** support@crisphealth.org

4 New User Creation Error

HIE Admin– Adding Individual Users

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

(4a) 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 Support@crisphealth.org

4b **Error**
Contact Exist with the given email at Different account

HIE Admin Tool – Provisioning Services

6 Assign Services

HIE Admin – Provisioning Services: Single User

Assign Services

Select the appropriate service available to Alaskan listed below in order to grant access. (Note: only one service may be selected at a time).

*Select ONE Service below:

Reports

Encounter
Notification
System (ENS)
ENS

6a

Next

(6a) Assign Services: Select Service (*note: only one service may be selected at a time*), Click *Next*
(6b) Click *Finish*

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

NOTE: The service, "Reports" provides access to CRS, via the CRISP Portal Dashboard.

CRS Reports Role Manager – Creating and Credentialing CRS Users

Access **Reports Role Manager** Application via CRISP Portal Dashboard:

The screenshot displays the CRISP Portal Dashboard. At the top, the CRISP logo is on the left, and the text "Connecting Providers with T" is on the right. Below the logo, it says "© CRISP. All Rights Reserved." and "MY HIE ADMIN(S)". To the right of this are links for "SEND FEEDBACK" and "PRODUCT UPDATES". A "HOME" button is on the left, and a search bar "Search Applications & Reports" is on the right.

A disclaimer states: "This query portal is for authorized use only. By using this system, all users acknowledge notice of, and agree to comply with, CRISP's Participation Agreement ('PA') and CRISP Policies and Procedures. Click here to review the policies and procedure. CRISP all users are adherent to an approved policy or use case. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use."

The main content area is divided into two sections. On the left is the "Patient Search" form with fields for First Name, Last Name, Date of Birth, Gender, and SSN, along with "Reset" and "Search" buttons. On the right is the "Search Results" section, which currently displays "No records found".

At the bottom is the "Your Dashboard" section with a gear icon and the text "For applications requiring patient context, please start by using the Patient Search interface above." Below this are six tiles: "Value Based Care Insights", "Reports Role Manager" (highlighted with a green border), "Referral Portal", "Reports", "Provider Directory", and "User Guide & Help".

Reports Role Manager Application –

The screenshot shows the CRISP Reports Role Manager Application interface. The top header includes the CRISP logo, copyright notice, and user information (CARSON, MIKE) with a LOGOUT button. The main content area features a search bar, a table of users, and action buttons. Callouts highlight the following features:

- Create Individual User**: Points to the '+ CREATE USER' button.
- Edit User**: Points to the 'EDIT DETAILS' button.
- Individual User Search**: Points to the 'Search User...' input field.
- User Import**: Points to the 'IMPORT' button.
- Org Active User list**: Points to the 'Active' column in the user table.
- User Export**: Points to the 'EXPORT' button.
- Advance Search**: Points to the 'ADVANCED SEARCH' link in the left sidebar.

User ID	First Name	Last Name	Email	Primary Organization	Active	LastUpdate
00302000009fzUYAAY	Tim	Hoye	tim@hmetrix.com	AAAAAAA	Yes	2023-09-11
nateiam	Nate	Hedburg	nate@hmetrix.com	AAAAAAA	Yes	2023-09-28

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Organizational Hierarchy in Role Manager

- **Report Applications:** Actual CRS reports and services utilized by end users. Access to these resources is managed by CRS POCs via Reports Role Manager.
- **Role:** A grouping of report applications that share similar attributes, (for example, All-Payer Panel-Based reports or HSCRC Regulatory Reports).
- **Role Profile:** A collection of roles that can be assigned to users and/or organizations.
- **Organizations:** Contain the collection of roles and role profiles typically assigned to users of a given organization.
- **Organizational Default Profile:** The default collection of roles and role profiles assigned to an organization. Organizational Role Profiles allow CRS POCs the ability to grant access to all roles or reports permissioned for the organization.

Organizational Hierarchy in Role Manager

Organization

Role Profile

Role

Roles/Role Profiles

Assign:

☐ Role ☒ Role Profile

Select Role Profile

Groups	Role Profiles	Role	Attribute Name	Override Level	Attribute Values
Organization: Test Org					
Application: MD CRS					
RoleName: Health Equity Explorer					
	Public Health	Health Equity Explorer	StaticRoleValue	Role	Health_Equity_User
RoleName: CovidReports					
	Public Health	CovidReports	StaticRoleValue	Role	COVID19_RM
RoleName: Public Health					
	Public Health	Public Health	StaticRoleValue	Role	PublicHealth

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Reports Role Manager Application –

CRISP

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SWITCH HIE | PHILLIP, KEVIN | LOGOUT

Selected HIE: CRISP MD

USER | USER APPROVALS | ORGANIZATION | APPLICATION | APP ROLES | ROLE PROFILES

Search User...

Search

+ CREATE USER | EDIT DETAILS

EXPORT | IMPORT

User ID	First Name	Last Name	Email	Primary Organization	Active	LastUpdate
0030200000DsJxDAAV	Muhammed	NVM	muhammednvm@hmetrix.c...	210001	Yes	2023-11-14
0030200000Fpgt6AAB	Anish	Admin	anishpk+admin@hmetrix.com	210001	Yes	2023-11-14

ORGANIZATION

210001 (210001)

CRISP (CRISP_RM)

hMetrix (hMetrix)

Howard County Health Departme...

PDPM MD (PDPM_MD)

Static Org (ST1)

1. To begin, click "**Create User**" to begin adding a new CRS user...

Reports Role Manager Application –

Create User

USER DETAILS APPLICATION ROLES

Search User

Email SEARCH

First Name Last Name Phone

Primary Organization Contact ID

User Role:

☒ End User ☐ Organization POC

CANCEL SAVE

2. Enter the email address of the user you want to create and press “Search.”
3. First Name, Last Name, Phone, and Contact ID should auto populate. If the user is not present in the HIE Portal, a notification will appear instructing you to first set up an account for that user in the HIE Admin Tool, then return to the Role Manager for further provisioning.
4. Select the primary organization of the user.
5. Click the “Save” button.

Reports Role Manager Application –

Once User Details have been saved, proceed to **Application Roles** to grant the access required by the user. By Default, each organization is credentialed with a standard group of Roles/Role Profiles appropriate for members of the organization. This **Organizational Default Profile** is found by selecting "*Organization*", followed by an organization name search below. With Organization selected, click, "**VIEW & ADD ORGANIZATION (DEFAULT PROFILE)**"

For each user, CRS POCs may activate or deactivate individual Roles/Role Profiles included within an organizational default profile. This is discussed later within this tutorial.

Edit User

USER DETAILS **APPLICATION ROLES**

Roles/Role Profiles

Assign:

☐ Role ☐ Role Profile ☒ Organization

Organization + VIEW & ADD ORGANIZATION (DEFAULT PROFILE)




Groups	Role Profiles	Role	Attribute Name	Override Level	Attribute Values
Organization: CRISP					
Organization: CRISP Admin					

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CANCEL SAVE






Reports Role Manager Application –


 Create User  






USER DETAILS

APPLICATION ROLES

 Roles/Role Profiles

Assign:
☐ Role ☐ Role Profile ☒ Organization
Organization
CRISP   [+ VIEW & ADD ORGANIZATION \(DEFAULT PROFILE\)](#)

Groups	Role Profiles	Role	Attribute Name	Override Level	Attribute Values
 Organization: CRISP					

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CANCEL

SAVE

Organizational Default Role Profiles allow CRS POCs the ability to grant access to all roles or reports permissioned for the organization.

Reports Role Manager Application –

Alternatively, Application Roles may be selected/assigned by individual Role and Role Profile; however, it is generally recommended to assign and configure user access via the Organizational Default Profile.

Edit User

USER DETAILS **APPLICATION ROLES**

Roles/Role Profiles

Assign:

☒ Role ☐ Role Profile

Organization

Groups	Role Profiles	Role	Attribute Name
+	Organization: CRISP		
+	Organization: CRISP Admin		

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Reports Role Manager Application –

Select "VIEW & ADD ORGANIZATION (DEFAULT PROFILE)" to open, "**Role Configuration**" for the organization.






Within Role Configuration, you can review the Roles/Role Profiles configured within the Organizational Default Profile.



If ALL Roles/Role Profiles are appropriate, click, "ADD PROFILES" and then "Save".

For any Roles/Profiles not required by the user, the CRS POC may deactivate individual Roles/Role Profiles by clicking the trashcan icon and selecting, *Remove Role* or *Remove Profile**.

Role Configuration

☐ Panel Based Roles PHI

Groups	Attribute Name	Attribute Values	
<input type="checkbox"/> ApplicationName: MD CRS			
<input type="checkbox"/> RoleName: Case Mix Program Loader			
	PanelID		
	Report	CaseMixProgramLoader	
	HospitalID		
<input type="checkbox"/> RoleName: Panel Based Reports			
	Report	PanelBasedReports	
	HospitalID		

 CANCEL  ADD PROFILE(S)

**As needed, deactivated Roles/Role Profiles may be reinstated by the POC.*

Reports Role Manager Application –

Assigning and Managing Organizational Default Profiles

Application: MD CRS					
RoleName: CovidReports					
	Public Health	CovidReports	StaticRoleValue	Role COVID19_RM	
RoleName: Health Equity Explorer					
	Public Health	Health Equity Explorer	StaticRoleValue	Role Health_Equity_User	
RoleName: Public Health					
	Public Health	Public Health	StaticRoleValue	Role PublicHealth	

Confirm

Do you want to remove all roles associated with **Public Health** profile or remove the role **Public Health** and its associated attributes or remove roles or profiles associated with organization **CRISP**?

REMOVE ENTIRE ORG'S ROLES

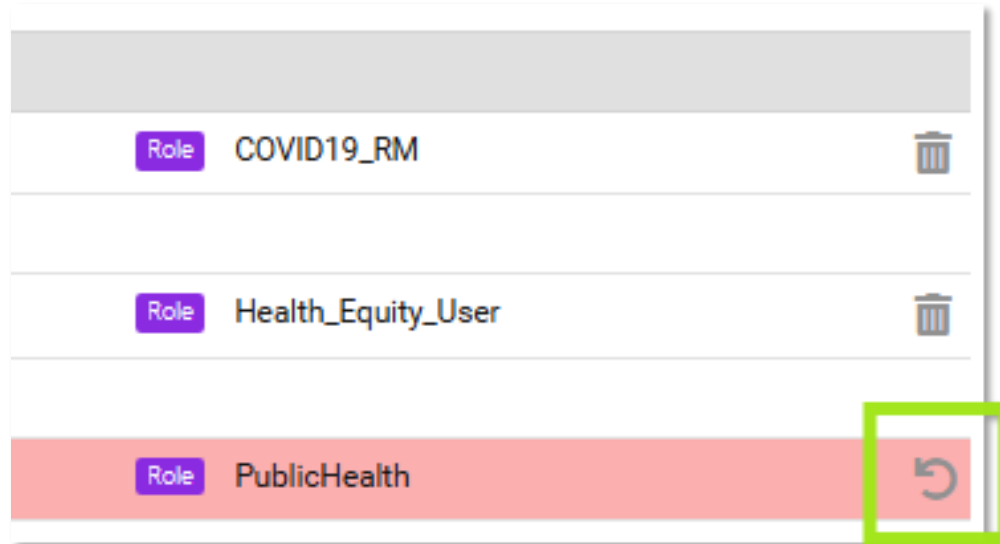
REMOVE PROFILE

REMOVE ROLE

CANCEL

Reports Role Manager Application –

Assigning and Managing Organizational Default Profiles



Deactivated roles (shown in red) may be reinstated by clicking the counter-clockwise arrow

HIE Admin Auditing of CRS Users



HIE Admin Auditing of CRS Users

Deactivation of CRS Users via HIE Admin Tool

- **HIE Admins must recertify their users every 90 days**
- **Deactivation of CRISP Portal accounts via the HIE Admin Tool will carry through to CRS.**

This will result in:

- Deactivation of the CRISP Portal account
- Deactivation within CRS
- Removal of all Portal assets
- Removal of all roles and role profiles within CRS

HIE Admin Auditing of CRS Users

Reactivation of CRS Users via HIE Admin Tool

- **Reactivation of CRISP Portal accounts via the HIE Admin Tool does not automatically reinstate CRS access.**
- **When a user's CRISP Portal account is reactivated:**
 - **HIE Admin**
 - Reinstates all required Portal assets/services back to the user's account. (For CRS, this includes the "Reports" asset/service.)
 - **CRS POCs**
 - Reinstall roles and role profiles, as needed

NOTE: Users recertified by the HIE Admin every 90 days will retain active status in CRS

Reports Role Manager and HIE Admin Tool – Key Terms and Definitions



Reports Role Manager - Key Terms and Definitions

- **Report Applications:** Actual CRS reports and services utilized by end users. Access to these resources is managed by CRS POCs via Reports Role Manager.
- **Role:** A grouping of report applications that share similar attributes, (for example, All-Payer Panel-Based reports or HSCRC Regulatory Reports).
- **Role Profile:** A collection of roles that can be assigned to users and/or organizations.
- **Organizations:** Contain the collection of roles and role profiles typically assigned to users of a given organization.
- **Organizational Default Profile:** The default collection of roles and role profiles assigned to an organization.
- **Services/Assets Required for CRS via CRISP Portal:**
 - **Reports:** This service populates the tile, “Reports” and access to CRS application via CRISP Portal Dashboard.
 - **Reports Role Manager:** This service populates the CRS POC tile, “Reports Role Manager” via CRISP Portal Dashboard. This service must be provisioned by CRISP.
- **HIE Admin Auditing/Recertification:** HIE Admins must audit and recertify their End Users every 90-days.

HIE Admin Tool - Key Terms and Definitions

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: Please contact your account owner for a full listing of CRISP services and descriptions.

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.