CRISP
Shared Services

Adding & Credentialing New CRS Users

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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)

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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

1a

HOME | ACCOUNTS | USERS | ADD USERS

WELCOME!

User Verification Process

HIE Admin Tool – Creating Individual Users

Adding & Credentialing New CRS 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

1a

| HOME | ACCOUNTS | USERS | ADD USERS |

1b

Single User   Bulk User

*Title

1c -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

Adding & Credentialing New CRS Users

2 **Creating a New User**

HIE Admin– Adding Individual Users

(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

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 Confirm | Cancel

3a Submit | Cancel

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

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

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.*

venture LLC   test@alaskhecak.com   Jennifer Jones   Marilyn1 Monroe1

6b Assign Services

Finish

Mobile

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CRS Reports Role Manager – Creating and Credentialing CRS Users

Adding & Credentialing New CRS Users

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

Reports Role Manager Application –

Individual User Search

Edit User

Create Individual User

User Import

Org Active User list

User Export

Advance Search

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

Reports Role Manager Application –

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

Reports Role Manager Application –

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.

Reports Role Manager Application –

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.

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
ApplicationName: MD CRS			
RoleName: Case Mix Program Loader			
		PanelID	
		Report	CaseMixProgramLoader
		HospitalID	
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

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

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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**
    - Reinstate roles and role profiles, as needed

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

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

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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).

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- **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.