



● ● ● CRISP

Shared Services

A decorative graphic consisting of a white dotted line that starts from the top right, moves left, then down, then left again, ending at an orange circle.

Reports Role Manager Application

CRISP Reporting Services (CRS)

Overview

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- A decorative graphic consisting of a horizontal dotted line that turns 90 degrees downward, ending in a solid orange circle.
- Introduce CRS Migration
 - General Workflow for Obtaining Access to Portal & CRS
 - HIE Admin Tool – Setting Up CRISP Portal Accounts & Assigning Services
 - Role Manager Application
 - HIE Admin Auditing of CRS Users
 - Key Terms & Definitions
 - CRS Migration and Role Manager Q&A

Introduce CRS Migration

- What is CRS Migration Project?
- What Changes are Expected?
- Trainings & Communications



Introduce CRS Migration

● What is CRS Migration Project?

CRS is leading an effort to migrate all active CRS members, from legacy CRS/LogOnce application to **CRISP Portal**.



Introduce CRS Migration

- What is CRS Migration Project?

Current State

- CRS is separate from CRISP Portal and all other CRISP services
- Multiple accounts possible for CRS users
- No integration between HIE Admins and CRS POCs

Future State

- CRS accessed via CRISP Portal Dashboard
- Single User ID access for CRS
- CRS Access governed through HIE Admins and CRS POCs



Introduce CRS Migration

● What Changes are Expected?

- **New URL:** Starting **July 1st**, CRS Reports will only be accessed via **CRISP Portal** (Portal.Crisphealth.org)
- **Account Access:** All users with active CRS accounts will need a CRISP Portal account
- **New Application for Managing CRS Users:** Reports Role Manager (CRS POCs)



● Trainings & Communications

Please be on the lookout to receive additional communications from CRS regarding **Role Manager** trainings and **CRS Migration**

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

HIE Admin Tool – Setting up CRISP Portal Accounts & Assigning Services



HIE Admin Tool – Setting up CRISP Portal Accounts & Assigning Services

- 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

Reports Role Manager



HIE Admin Tool – Setting up CRISP Portal Accounts & Assigning Services

Access Portal via, <https://portal.crisphealth.org> and open HIE Admin Tool:

The screenshot shows the CRISP portal dashboard. At the top left is the CRISP logo. To the right of the logo is the text "Connecting Providers with T". Below the logo is the copyright notice "© CRISP. All Rights Reserved.". In the top right corner, there are three navigation links: "MY HIE ADMIN(S)", "SEND FEEDBACK", and "PRODUCT UPDATES". Below these links is a search bar labeled "Search Applications & Reports". A disclaimer text is present below the search bar. The main content area is titled "Your Dashboard" and contains a row of application tiles. The "HIE Admin Tool" tile is highlighted with a green border. Other tiles include "Provider Directory v3-0", "CRISP Role Manager", "Reports", "CRI - Troubleshooting", "CRISP Reporting Service", "Provider Directory v2-0", and "User Gr".

HIE Admin Tool – Setting up CRISP Portal Accounts & Assigning Services

Step 1: Create a new CRISP Portal account – “Add Users”

The screenshot shows the HIE Admin Tool interface. The top left corner displays the logo "HIE Admin Tool" and "CRISP Shared Services". The top right corner shows a notification bell icon, a user profile icon for "MICHAEL ...", and a dropdown arrow. The main navigation bar contains the following items: HOME, ACCOUNTS, USERS, ADD USERS (highlighted with a green box), and USER GUIDE & HELP. Below the navigation bar, there are two tabs: "Single User" (selected) and "Bulk User". The "Single User" tab is active, showing a form with a required field labeled "* Title" and a dropdown menu currently set to "-None-". At the bottom of the form, there are two buttons: "Submit" and "Cancel".

HIE Admin Tool – Setting up CRISP Portal Accounts & Assigning Services

Step 2: Assign the Service, “Reports” - to populate the CRS tile, “Reports” within the user’s CRISP Portal Dashboard

The screenshot shows the HIE Admin Tool interface. At the top left, it says "HIE Admin Tool" and "CRISP Shared Services". On the right, there is a user profile for "MICHAEL ...". Below the header, there is a navigation menu with "HOME", "ACCOUNTS", "USERS", "ADD USERS", and "USER GUIDE & HELP". The main content area shows a contact card for "Contact Ad Boy" with fields for Title, Account Name (CRISP-MD Internal), Phone, Email (rexhubbardfilms@gmail.com), Contact Owner, and Audit By. A "Service Management" button is highlighted with a green box.

The "Assign Services" dialog box contains the following text: "Select the appropriate service available to Alaskan listed below in order to grant access. (Note: only one service may be selected at a time)." Below this, there is a section titled "Select ONE Service below:" with two options: "Reports" (which is selected and highlighted with a green box) and "Encounter Notification System (ENS)".



HIE Admin Tool – Setting up CRISP Portal Accounts & Assigning Services

New CRISP Portal Users – 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

Role Manager Application – Adding & Credentialing Users



● Reports Role Manager Application – Adding & Credentialing Users

- 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

Reports Role Manager



Reports Role Manager Application – Adding & Credentialing Users

Access Reports Role Manager Application via CRISP Portal Dashboard:

The screenshot displays the CRISP Portal Dashboard. At the top left is the CRISP logo and the text "Connecting Providers with T". Below this is a navigation bar with "MY HIE ADMIN(S)", "SEND FEEDBACK", and "PRODUCT UPDATES". A search bar labeled "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" table with columns for First Name, Last Name, Date of Birth, Gender, and Address. The table currently shows "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 application 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



Reports Role Manager Application – Adding & Credentialing Users

The screenshot shows the CRISP Reports Role Manager application interface. The top navigation bar includes the CRISP logo, copyright notice, and user information for CARSON, MIKE. A search bar is present in the top right. The main content area features a table of users with columns for User ID, First Name, Last Name, Email, Primary Organization, Active status, and LastUpdate. Callouts point to various UI elements: 'Create Individual User' points to the '+ CREATE USER' button; 'Edit User' points to the 'EDIT DETAILS' button; 'Individual User Search' points to the search bar; 'User Import' points to the 'IMPORT' button; 'Org Active User list' points to the 'Active' column; 'User Export' points to the 'EXPORT' button; 'Advance Search' points to the 'ADVANCED SEARCH' sidebar; and 'Create Individual User' also points to the search bar.

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

Reports Role Manager Application – Adding & Credentialing Users

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.



Reports Role Manager Application – Adding & Credentialing Users

Organizational Hierarchy in Role Manager

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

Page 1 of 1

Organization

Role Profile

Role



Reports Role Manager Application – Adding & Credentialing Users

Assigning and Managing Organizational Default Profiles

Edit User [Close]

USER DETAILS | **APPLICATION ROLES**

Roles/Role Profiles

Assign:

Role Role Profile Organization

Organization [Dropdown] + 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 – Adding & Credentialing Users

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

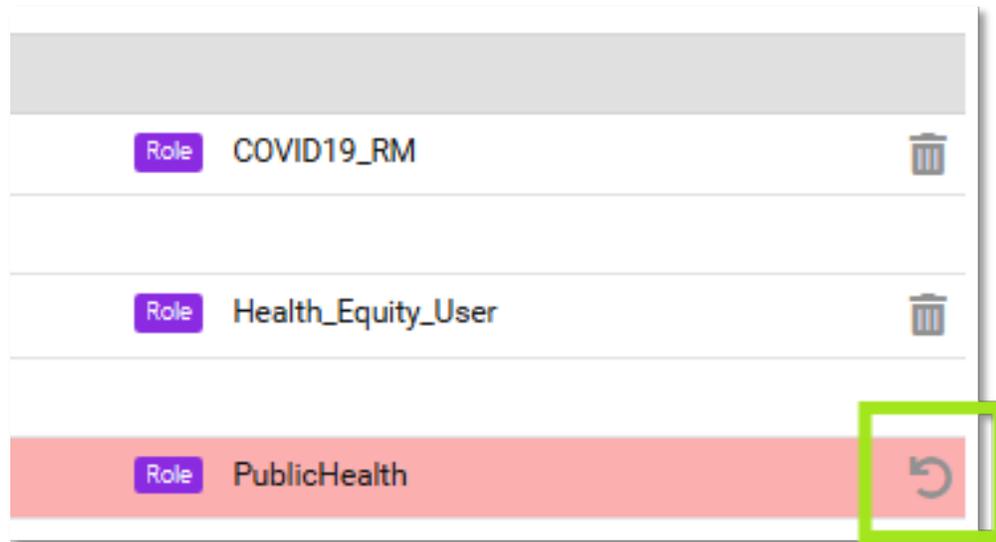
Confirm ×

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 – Adding & Credentialing Users

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
 - Reinstates roles and role profiles, as needed

Key Terms and Definitions



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.

CRS Migration and Role Manager Q&A

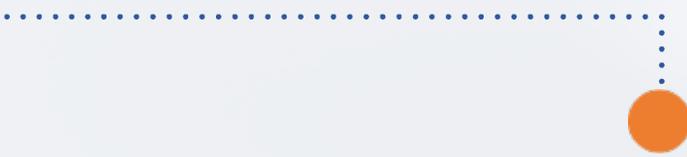
Question 1

A decorative graphic consisting of a horizontal dotted line that ends in a vertical dotted line leading down to a solid orange circle.

Q: Will my access to CRS reports remain the same after CRS migration, ensuring continuity?

- **A: Yes,** your access to historical CRS reports will remain the same.

Question 2

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Q: Will all users with active CRS accounts require a CRISP Portal account, and if so, how will they be informed about registering for one?

- **A:** Yes, all users with active CRS accounts will require a CRISP Portal account. If you don't already have one, you will receive a Portal registration email on the day of the migration with instructions on how to set up your account.

Question 3

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Q: Does CRS have an itemized list of reports contained within the roles?

- **A:** Within Role Manager, we are working to add an itemized detail of all reports imbedded within each role. Please reach out to CRS if you have any questions. report-support@crisphealth.org

Question 4

Q: What is deactivation carry through from HIE Admin Tool to RM?

- **A:** Every 90 days, HIE Admins must recertify their users' accounts. Users not recertified within this timeframe are deactivated by the system and their roles and profiles are removed from Role Manager. Users who *are* recertified within the 90-day timeframe will retain their existing access.
- **A:** Upon reactivation, the HIE Admin must reassign all necessary services/assets to the user's account. If the "Reports" asset is restored, the CRS POC(s) must additionally reinstate the user's CRS roles and profiles within Role Manager, for any prior or new organizations within CRS.

Question 5

A decorative orange circle is positioned at the end of a dotted line that extends from the bottom of the "Question 5" header.

Q: Are CRS POCs required to be HIE Admins?

- A: No, the CRS POC role is separate from the HIE Admin role; however, for continuity, it is generally recommended that these admin members hold both roles.

Question 6

A decorative graphic consisting of a horizontal dotted line that ends in a vertical dotted line, which then points down to a solid orange circle.

Q: If I have additional questions, who can I contact?

- **A:** For questions concerning CRISP Portal accounts, please contact:
CRISP Technical User Support – support@crisphealth.org
- For questions concerning CRS, please contact:
CRS Support – report-support@crisphealth.org