



# CRISP

Chesapeake Regional Information  
System for our Patients

# HIE Admin Tool User Guide

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# 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.

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# 1 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.

## 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.**

### **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 contacting HIE Technical User Support Team at 877-952-7477 or [support@crisphealth.org](mailto:support@crisphealth.org).

## 2 Accessing the Tool

**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

*After logging into your CRISP Portal Account, navigate to the "HIE Admin Tool" tile. There you will see the screen below.*



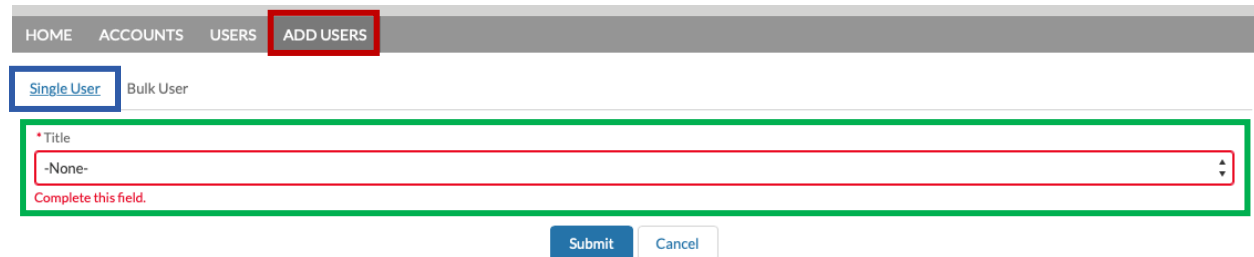
**WELCOME!**

User Verification Process

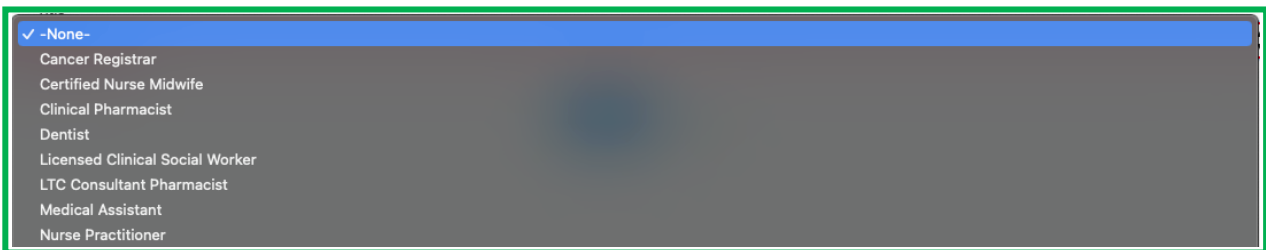
## 3 Creating Individual Users

### 3.1 Selecting a Title

To provide access to HIE tools, first click the **Add Users** tab at the top of the home screen and ensure "**Single User**" is underlined. Then, select the applicable title from the **drop-down list**.



The screenshot shows the 'ADD USERS' tab selected in the top navigation bar. Below it, the 'Single User' tab is highlighted. A red box highlights the 'ADD USERS' tab. A green box highlights the 'Single User' tab. A red box highlights the 'Title' drop-down menu, which is currently set to '-None-'. Below the drop-down menu, a red box highlights the 'Submit' button.



The screenshot shows the title drop-down menu with the following options: -None- (selected), Cancer Registrar, Certified Nurse Midwife, Clinical Pharmacist, Dentist, Licensed Clinical Social Worker, LTC Consultant Pharmacist, Medical Assistant, and Nurse Practitioner.

### 3.2 Creating a New User

To create a new user, complete the following fields. Keep in mind that all fields marked with asterisks \* are required. **NOTE: \*User Type üselect 'Portal,**



The screenshot shows the 'Single User' form with the following fields: Title (Other Licensed Healthcare Practitioner), Organization (--None--), User Type (--None--), First Name, Last Name, Email, Department (--None--), State License (--None--), and PL --. The 'User Type' field is highlighted with a red box and a red error message 'Complete this field.' is displayed below it.

### 3.3 Submitting a New User & Attestation

**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.

Once all required fields are filled out press the **Submit** button at the bottom of the form.

[HOME](#) [ACCOUNTS](#) [ASSETS](#) [ADD USERS](#)

[Single User](#) [Bulk User](#) [Unprocessed Users](#)

\* Title

Other Licensed Healthcare Practitioner

\* Organization

--None--

\* User Type

--None--

\* First Name

\* Last Name

\* Email

\* Department

--None--

State License

--None--

Phone

Submit

Cancel

After you click Submit, an attestation screen will appear, acknowledge the terms and conditions by clicking the check boxes then click **Confirm**.

#### Confirm

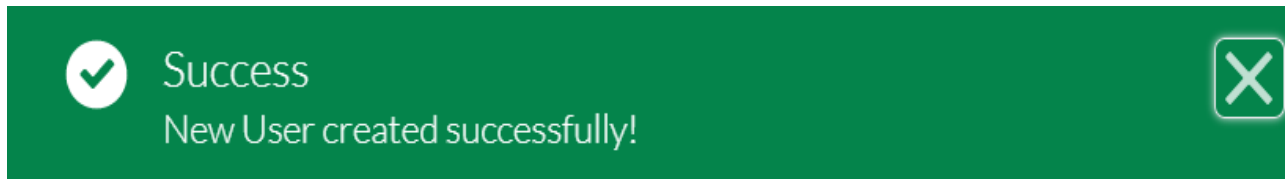
☒ As a designated HIE Administrator or Point of Contact, on behalf of the above organization, I attest the Authorized User is a member of the organization's workforce and their identity has been verified in accordance with requirements outlined in the HIE policies and procedures as applicable.

☒ 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.

Confirm

Cancel

A green pop-up message will appear once User has been successfully onboarded.

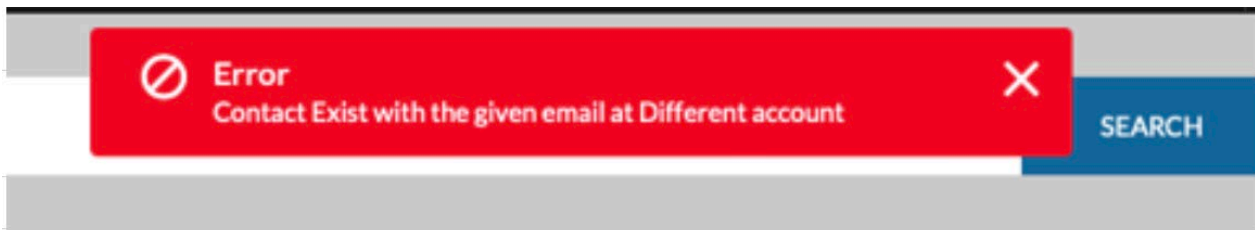


### 3.4 New User Creation Error

Once attestations are checked and you click *Confirm*, the system will verify the email address submitted on the new User creation request.

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.*

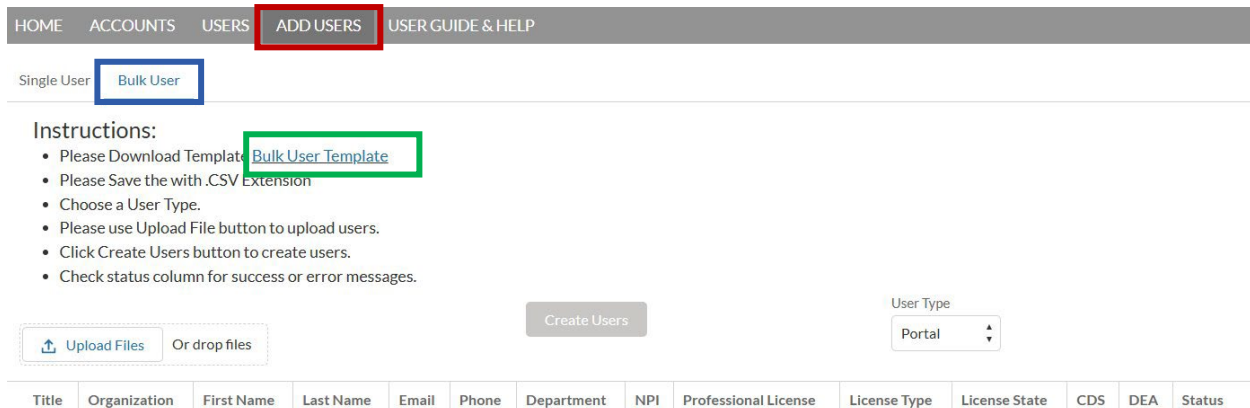
This could be at an account you manage or another account within the system. *Search for the User in accounts that you manage* [see User Search section](#). *If the User does not exist in an account you manage, contact Technical User Support.*



## 4 Creating Multiple Users

### 4.1 Preparing the Bulk Upload Form

To start, click the **Add Users** tab at the top of the home screen, then click the **Bulk User** tab. Click on the “**Bulk User Template**” hyperlink within the “Instructions” section. Download, complete, and save as a .csv file prior to beginning the Bulk Upload process.

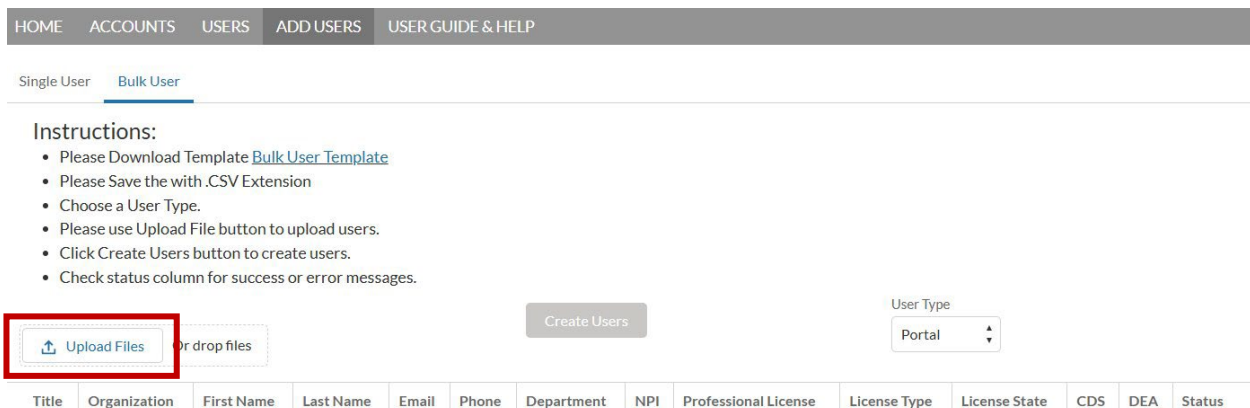


The screenshot shows the 'ADD USERS' tab selected in the top navigation bar. Below it, the 'Bulk User' sub-tab is active. The 'Instructions' section contains a list of steps, with the 'Bulk User Template' link highlighted in a green box. Below the instructions, there is an 'Upload Files' button with an upload icon, a 'Create Users' button, and a 'User Type' dropdown menu set to 'Portal'. At the bottom, a table header is visible with columns: Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License, License Type, License State, CDS, DEA, and Status.

### 4.2 Uploading Files

First, 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.



This screenshot is identical to the one above, but the 'Upload Files' button is highlighted with a red box to indicate the next step in the process.

## 4.3 Creating Users

Select **Create Users** to import your list into the HIE database.

HOME
ACCOUNTS
USERS
ADD USERS
USER GUIDE & HELP

Single User
Bulk User

**Instructions:**

- Please Download Template [Bulk User Template](#)
- Please Save the with .CSV Extension
- Choose a User Type.
- Please use Upload File button to upload users.
- Click Create Users button to create users.
- Check status column for success or error messages.

Upload Files
Or drop files

Create Users

User Type  
Portal

Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Type	License State	C
Scribe	Junior Smoke Test	CRISP Test	Test1	crisptest@crisphealth.org	1231231231	Admissions	1231231231				
Scribe	Junior Smoke Test	CRISP Test	Test2	crisptest@crisphealth.org	1231231232	Admissions	1231231232				
Scribe	Junior Smoke Test	CRISP Test	Test3	crisptest@crisphealth.org	1231231233	Admissions	1231231233				
Scribe	Junior Smoke Test	CRISP Test	Test4	crisptest@crisphealth.org	1231231234	Admissions	1231231234				
Scribe	Junior Smoke Test	CRISP Test	Test5	crisptest@crisphealth.org	1231231235	Admissions	1231231235				
Scribe	Junior Smoke Test	CRISP Test	Test6	crisptest@crisphealth.org	1231231236	Admissions	1231231236				

## 4.4 Submitting Updated Users and Attestation

Once you've selected Create Users, an attestation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click **Confirm**.

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.

Confirm
Cancel

A pop-up window will show the number of Users created and the number of failed records.

Message

1 successfully created  
0 failed Records

## 4.5 Users with Errors

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. 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.

Single User
Bulk User

Instructions:

- Please Download Template [Bulk User Template](#)
- Please Save the with .CSV Extension
- Choose a User Type.
- Please use Upload File button to upload users.
- Click Create Users button to create users.
- Check status column for success or error messages.

Upload Files
Or drop files

Create Users

User Type  
Portal

Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Type	License State	CDS	DEA	Status
<div>Reprocess Users</div>													
Error Message	Title	Organization	First Name	Last Name	PDMP Specialty								
NPI should be 10 digits	Scribe	CRISP Test	CRISP Test	Test1									

## 4.6 Adding Non-Portal PDMP Users

This process allows HIE Administrators to bulk create users who need **PDMP access only through the EHR (InContext)**, without requiring access to the CRISP Portal. These users do not appear in the HIE Admin Portal and are **not subject to 90-day user audits**, reducing administrative overhead. This option is ideal for physician **residents, interns, or fellows** who only need to view PDMP data within the EHR and do not need access to the full CRISP Portal platform.

HIE Administrators who wish to enable this functionality must contact their CRISP Account Manager, as it is not available by default.

### Steps to Add Non-Portal Users:

1. Ensure the physician resident, intern, or fellow has registered for PDMP access using their **personal email** at the following link:

<https://crisphie.my.site.com/PDMP/s/>

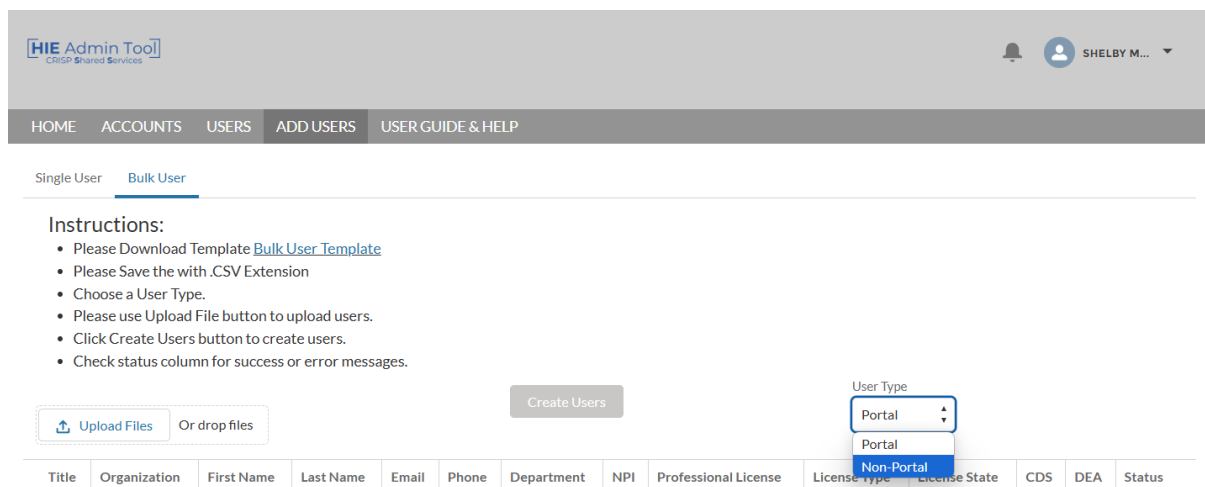
This registration allows CRISP to link their PDMP credentials to their organizational record via NPI.

2. Download the Bulk Upload Template as described in Section 4.1.

3. Complete the template by including:

- **User Type:** Select Non-Portal
- **Organizational Email Address** (do not use personal email)
- **NPI**
- **Organizational DEA number and individual suffix** (if applicable)

4. Upload the completed file as outlined in Sections 4.2–4.4. Be sure to select **User Type: Non-Portal** during the upload.



Single User **Bulk User**

**Instructions:**

- Please Download Template [Bulk User Template](#)
- Please Save the with .CSV Extension
- Choose a User Type.
- Please use Upload File button to upload users.
- Click Create Users button to create users.
- Check status column for success or error messages.

**Upload Files** Or drop files **Create Users**

User Type  
Portal  
Portal  
**Non-Portal**

Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License type	License State	CDS	DEA	Status
-------	--------------	------------	-----------	-------	-------	------------	-----	----------------------	--------------	---------------	-----	-----	--------

5. If a contact record already exists with the submitted organizational email, an error message (e.g., “Contact already exists”) will be displayed. Please contact **CRISP Technical User Support** for assistance resolving the conflict.

**Note:** This workflow supports long-term continuity of PDMP access. Residents register with their **personal email** so they can retain access as independent providers in the future. The **organizational email** is used for bulk creation and InContext access during their residency.

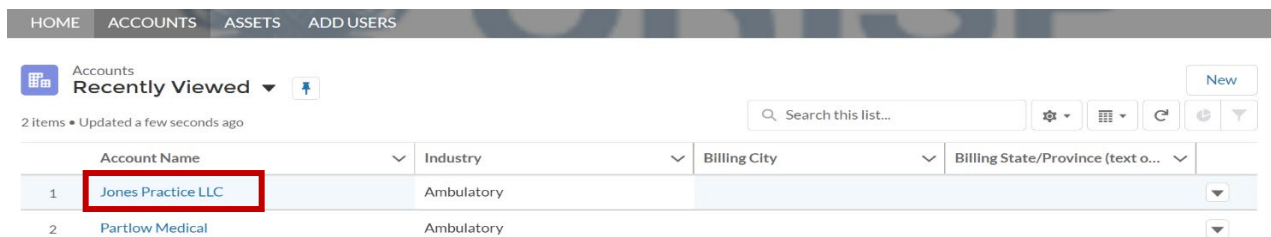
## 5 Managing Existing Users

*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.

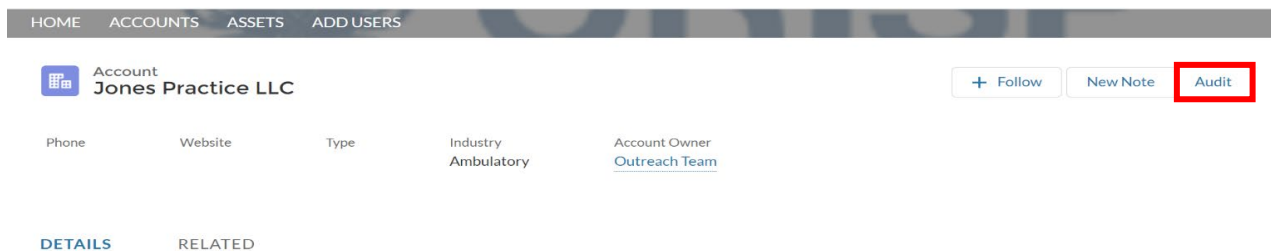
### 5.1 Choosing an Account

In the Accounts tab, choose the Account you would like to audit by clicking on the **Account Name**.



	Account Name	Industry	Billing City	Billing State/Province (text o...
1.	Jones Practice LLC	Ambulatory		
2.	Partlow Medical	Ambulatory		

Select **Audit** on the top-right of your screen.



Account Jones Practice LLC				
Phone	Website	Type	Industry	Account Owner
			Ambulatory	Outreach Team

DETAILS RELATED

## 5.2 Managing Active Users

To work with Active Users, ensure the **Active User** tab is selected. 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. Select **Deny** to revoke access for individuals who are no longer employees within your organization.

**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.

Q Search

**Active User** | Suspended User

**Active Users** Approve Current Page

Status	Name	Email	Member Title	Department	Audit Date	Audit By
<b>Approve</b>   Deny	HIE AdminEmail	mpartlow@avideon.com				
Approve   <b>Deny</b>	Juan Gonzalez					

Select **Complete Audit**, confirm selections on User Confirmation Page then select "Finish"

Complete Audit Cancel

## 5.3 Managing Suspended Users

To work with suspended users, ensure the **Suspended User** tab is selected. If Suspended Users are present, select the appropriate indicator to **Approve or Deny** the user. If denied, the user account will be revoked. 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.**

Active User | **Suspended User**

**Suspended Users** Approve Current Page

Status	Name	Email	Member Title	Department	Audit Date	Audit By
<b>Approve</b>   Deny	Laughter Ajibade	laughter@test.com	Nurse Practitioner		2021-03-16	2021-03-16
<b>Approve</b>   Deny	Peter Shay	shay@test.com	Physician, Intern		2021-03-17	2021-03-17
<b>Approve</b>   Deny	Test Thu1	testthu1@test.com	Dentist		2021-03-17	2021-03-17
<b>Approve</b>   Deny	Nick Redfurn	nick@test.com			2021-03-18	2021-03-18
<b>Approve</b>   Deny	test singleuser	test@sunuser.com	Dentist		2021-03-18	2021-03-18

Complete Audit Cancel

## 5.4 Confirming an Audit

Upon clicking *Finish*, you will see the Success prompt, indicating you have successfully managed your users.

### HIE Admin - User Confirmation Page

Deactivated Users	
Name	Email
sherlock sherlock	holmes52@asdasdas.com

Active Users	
Name	Email
pencil2 eraser2	pencil2eraser2@gkjdsiafd.com

Previous

Finish

 **Success**  
All records Successfully Updated



## 5.5 Editing User Details

### 5.5.1 Choosing a User

Click the **Users** tab, then enter a name or email in the **search** and hit enter.

HOME
ACCOUNTS
**USERS**
ADD USERS
USER GUIDE & HELP

All Contacts

Search Contact

	Name	Account Name	Member Title	Email	Phone	Status
1	User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active

< Previous

Page 1 of 1

Next >

### 5.5.2 Viewing and Selecting a Contact

Choose the Contact (User) you would like to view by clicking on the **Contact Name**.

HOME
ACCOUNTS
**USERS**
ADD USERS
USER GUIDE & HELP

All Contacts

Search Contact

	Name	Account Name	Member Title	Email	Phone	Status
1	User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active

< Previous

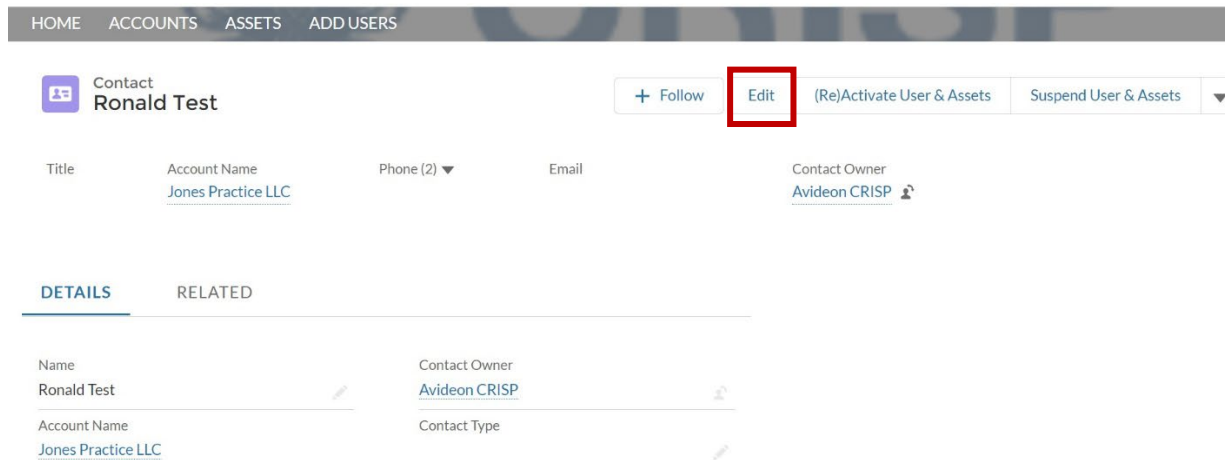
Page 1 of 1

Next >

## 5.5.3 Editing and Saving a Contact

**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.

Select **Edit** to update the contact's information.



HOME ACCOUNTS ASSETS ADD USERS

Contact **Ronald Test** + Follow **Edit** (Re)Activate User & Assets Suspend User & Assets

Title Account Name Phone (2) Email Contact Owner

Jones Practice LLC Avidcon CRISP

**DETAILS** RELATED

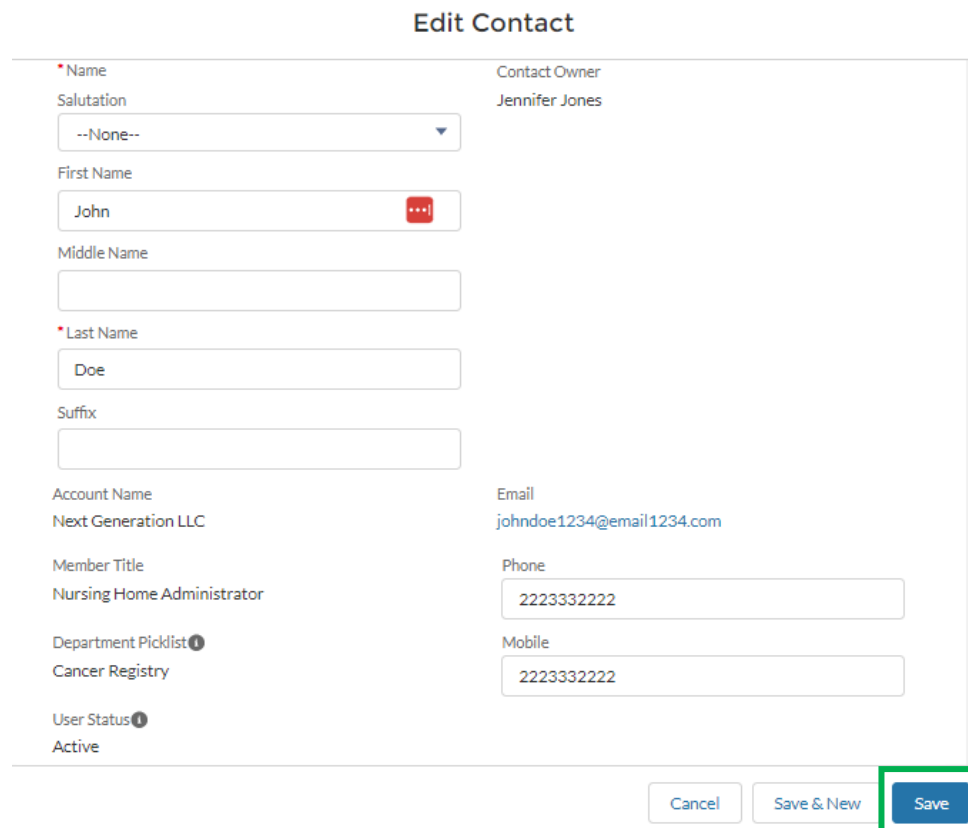
Name Contact Owner

Ronald Test Avidcon CRISP

Account Name Contact Type

Jones Practice LLC

Select **Save** to confirm the updated information.



### Edit Contact

\* Name Salutation Contact Owner

--None-- Jennifer Jones

First Name

John

Middle Name

\* Last Name

Doe

Suffix

Account Name Email

Next Generation LLC johndoe1234@email1234.com

Member Title Phone

Nursing Home Administrator 2223332222

Department Picklist Mobile

Cancer Registry 2223332222

User Status

Active

Cancel Save & New **Save**

## 5.6 User Search

### 5.6.1 Search for Users in any account you manage:

Enter User's first name, last name, full name or email address in the *search bar* at the top of the Users tab.

HOME
ACCOUNTS
**USERS**
ADD USERS
USER GUIDE & HELP

All Contacts

Search Contact

	Name	Account Name	Member Title	Email	Phone	Status
1	User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active

< Previous

Page 1 of 1

Next >

### 5.6.2 Search for Users within the User Audit Page

Enter the User's first or last name in the *search bar*.

HOME
ACCOUNTS
ASSETS
ADD USERS

HIE Admin - User Audit Page

Audit Account : Test Account

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.

Active Users

Approve All

## 5.7 Password/Activation Email Reset

User **HIE Portal** password or activation email can be reset in the HIE Admin Tool.

First, **search** for User in Users tab, then **click** on the User's name.

HOME
ACCOUNTS
**USERS**
ADD USERS
USER GUIDE & HELP

All Contacts

Search Contact

	Name	Account Name	Member Title	Email	Phone	Status
1	User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active

< Previous

Page 1 of 1

Next >

Next, click on **User Services** tab, then click **View All** to expand view.

HOME
ACCOUNTS
USERS
ADD USERS
USER GUIDE & HELP

**Contact**  
**User Account**

+ Follow
Edit
Service Management

Account Name  
[Junior Smoke Test](#)

HIE Source  
CRISP-MD

Phone  
(111) 111-1111

Email  
[useraccounts@crispsharedservices.com](mailto:useraccounts@crispsharedservices.com)

DETAILS
**USER SERVICES**

**User Services (3)**

Service	User Services	Status	Username	Activation Date
Snapshot	<a href="#">User Account - Junior Smoke Test - Snapshot</a>	Active		6/14/2024
Clinical Information	<a href="#">User Account - Junior Smoke Test - InContext</a>	Active		6/14/2024
HIE Portal	<a href="#">User Account - Junior Smoke Test - Portal</a>	Active	useraccounts@crispsharedservices.com	6/14/2024

View All

Next, click on the blue hyperlink name in the **User** column associated with **Portal** only:

<username><account name>Portal

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 Information	User Account - Junior Smoke Test - InContext	Active		6/14/2024
HIE Portal	User Account - Junior Smoke Test - Portal	Active	useraccounts@crispsharedservices.com	6/14/2024

View Less

Click on **HIE Portal User Management**.

Asset  
**Plum10 Fruit10 - Next Generation LLC - Portal**

HIE Portal User Management

Account <a href="#">Next Generation LLC</a>	Contact <a href="#">Plum10 Fruit10</a>	Product <a href="#">HIE Portal</a>	Status Active	Install Date 6/22/2022
--	---	---------------------------------------	------------------	---------------------------

DETAILS RELATED

Asset Name  
Plum10 Fruit10 - Next Generation LLC - Portal

Account  
[Next Generation LLC](#)

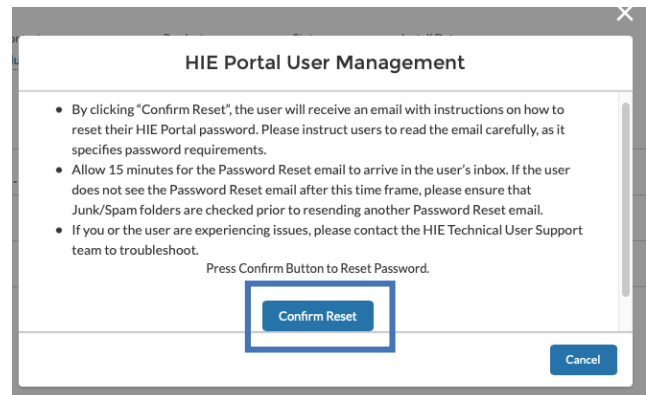
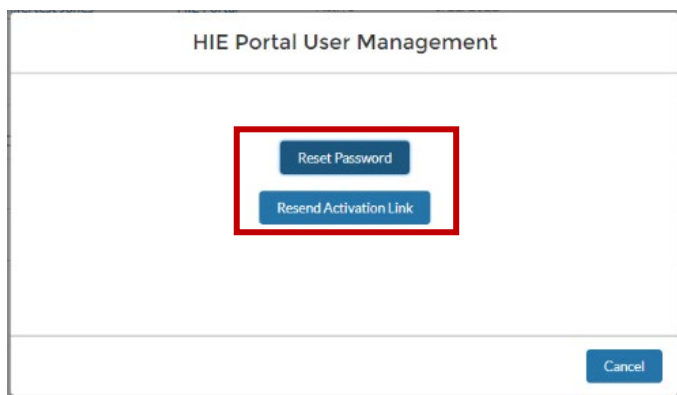
Product  
[HIE Portal](#)

Status  
Active

Contact  
[Plum10 Fruit10](#)

Username  
plum10fruit10@lkadjflakjf.com

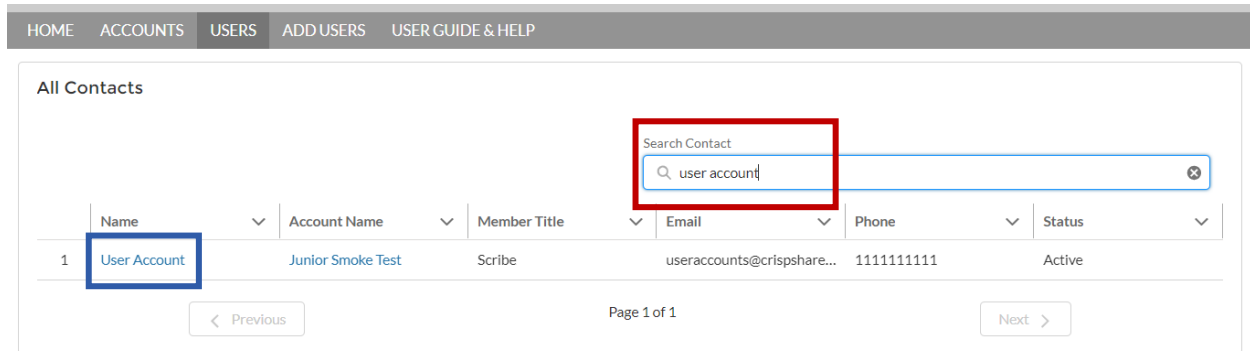
After clicking, HIE Portal User Management, a pop-up window will appear. Click on **Reset Password or Resend Activation Link** from the Pop-Up. The Resend Activation Link will be greyed out if a user has already activated their account. Finally, read the instructions then click on **Confirm Reset**.



## 6 Provisioning Services

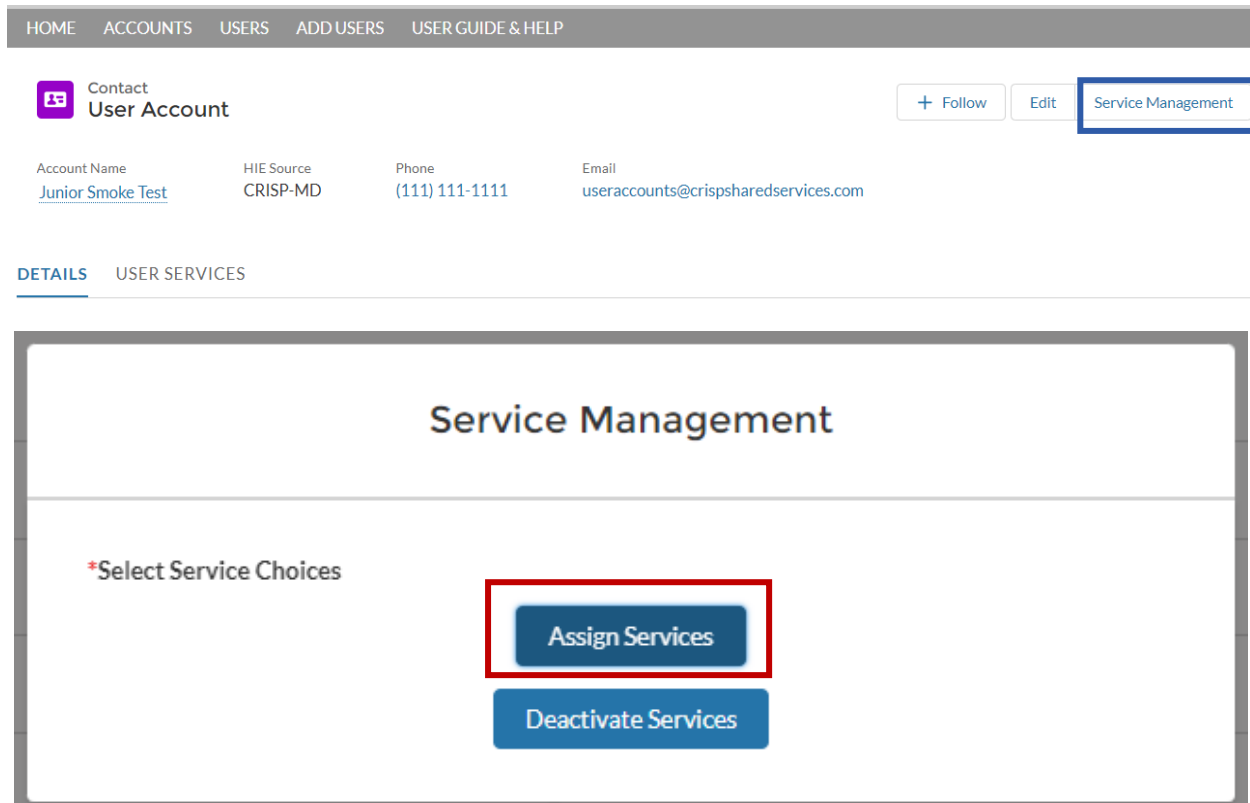
### 6.1 Assign Services

First, access the active User using the **search bar** in the Users tab, then click on the **User's name**.



	Name	Account Name	Member Title	Email	Phone	Status
1	User Account	Junior Smoke Test	Scribe	useraccounts@crispshare...	1111111111	Active

Next, select **Service Management**. A pop-up window will appear. Select **Assign Services**.



HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Contact User Account + Follow Edit Service Management

Account Name: [Junior Smoke Test](#) HIE Source: CRISP-MD Phone: (111) 111-1111 Email: useraccounts@crispsharingservices.com

**DETAILS** USER SERVICES

### Service Management

\*Select Service Choices

**Assign Services**

**Deactivate Services**

Select the Service you wish to assign and click *Next*.

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

\* Select at least one service below:

CSS Event  
Notification  
Deliver (CEND):  
Population  
Explorer  
CEND

COVID-19 Lab  
Tools  
COVIDLabTools

Previous

Next

Finally, click *Finish*.

## Service Management

Success!

Finish

## 6.2 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)

First, select the *Account* associated with the Users who need access to a service.


HOME	ACCOUNTS	USERS	ADD USERS	A
Accounts				
All Accounts ▾				
10 items • Sorted by Account Name • Filtered by All accounts				
Account Name ↑				
1	Alaska Adventure LLC			
2	CRISP-MD Internal			
3	Deep Space Nine LLC			
4	Franklin's House LLC			
5	HIE Source Field Test			
6	Next Generation LLC			

Next, select the *Services* tab – the Service tab will display all services available for Admins to add to users of this account.

Account				
Next Generation LLC				
Website		Industry		
		Ambulatory		
DETAILS	PANELS	SERVICES	ACTIVE USERS	SUSPENDED USERS
Account Name				
Next Generation LLC				
Parent Account				
Industry				
Ambulatory				

## 6.3 Select Service

First, identify the **service name** in the "Service" column, then click on the **Org Service blue hyperlink** (next to the Service) you would like to provision to Users.


**Account**  
**Next Generation LLC**


Website  
Industry  
Ambulatory

DETAILS   ACTIVE USERS   SUSPENDED USERS   PANELS   **SERVICES**

Services	Org Service	Status
HIE Portal	<a href="#">Next Generation LLC - Portal</a>	Active
Clinical Information	<a href="#">Next Generation LLC - InContext</a>	Active
Referrals	<a href="#">Next Generation LLC - ReferralUI</a>	Active
Prescriber Reports	<a href="#">Next Generation LLC - PrescriberReports</a>	Active
COVID-19 Lab Tools	<a href="#">Next Generation LLC - COVIDLabTools</a>	Active
<b>Snapshot</b>	<a href="#">Next Generation LLC - Snapshot</a>	Active
Clinical	<a href="#">Next Generation LLC - Clinical</a>	Active
Unified Landing Page (ULP)	<a href="#">Next Generation LLC - ULP</a>	Active
Encounter Notification System (ENS)	<a href="#">Next Generation LLC - ENS</a>	Active

Next, Click **Service Management**.

HOME   ACCOUNTS   USERS   ADD USERS   USER GUIDE & HELP


**Asset**  
**Next Generation LLC - CEND**

Service Management

Account  
[Next Generation LLC](#)

Contact

Product  
[CSS Event Notification Delivery \(CEND\): Population Explorer](#)

Status  
Active

Install Date  
10/9/2024

DETAILS   RELATED

Finally, click **Assign Services**.

Snapshot   Active   5/8/2023

Service Management

\*Select Service Choices

Assign Services

Deactivate Services

## 6.4 Select Users

First, select the User(s) you are granting access this service by *checking the box* next to their name. Then, click [Confirm Selections](#).

### Assign Service

#### Assign Snapshot Service



Select the User(s) to provide access to this service. \*

**Tip:**

1. To select all Users on the current page, click on the box next to "Name".
2. Do not select more than 100 Users at a time.

	<input type="checkbox"/> Name	Email	Member Title
1	<input type="checkbox"/> Aalnerer1 chestington1	aalnerer1chestington1...	
2	<input checked="" type="checkbox"/> Aalnerer10 chestingto...	aalnerer10chestington...	
3	<input type="checkbox"/> Aalnerer100 chestingt...	aalnerer100chestingto...	
4	<input checked="" type="checkbox"/> Aalnerer101 chestingt...	aalnerer101chestingto...	



Page 1 of 10.

Showing 1 to 50 of 488 records.

[Confirm Selections](#)

## 6.5 Confirm Selections

First review and confirm *list of users* who should access this service, then click *Complete!*

### Assign Service

---

### Assign Snapshot Service

---

Select Access ✓ Confirm Selections Complete!

Assign the following Access:

- *HIE Portal*

To the following Users:

	Name	Email	Member Title
1	Aalnerer10 chestington10	aalnerer10chestington1...	
2	Aalnerer11 chestington11	aalnerer11chestington1...	
3	Aalnerer13 chestington13	aalnerer13chestington1...	
4	Aalnerer101 chestington...	aalnerer101chestington...	

< >

Previous **Complete!**

Success, you have provisioned access of a service to multiple users! Click *Finish*.

### Assign Service

---

### Assign Snapshot Service

---

Select Access ✓ ✓ Complete!

Success!

**Finish**

## 7 Deactivating Services for a Single User

Access the active User using the **search bar** at the top of the Users tab, then click on the **User's name**.

[HOME](#)
[ACCOUNTS](#)
[USERS](#)
[ADD USERS](#)
[USER GUIDE & HELP](#)

All Contacts

Search Contact

	Name	Account Name	Member Title	Email	Phone	Status
1	User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active


< Previous

Page 1 of 1

Next >

Next, click **Service Management**, then click **Deactivate Services** from the pop-up window.

[HOME](#)
[ACCOUNTS](#)
[USERS](#)
[ADD USERS](#)
[USER GUIDE & HELP](#)



Contact  
**User Account**

[+ Follow](#)
[Edit](#)
[Service Management](#)

Account Name

Junior Smoke Test

HIE Source

CRISP-MD

Phone

(111) 111-1111

Email

useraccounts@crispsharingservices.com

[DETAILS](#)
[USER SERVICES](#)

CRISP-MD
lkdfjsajjkl@lsaksjfdlakjf234.com

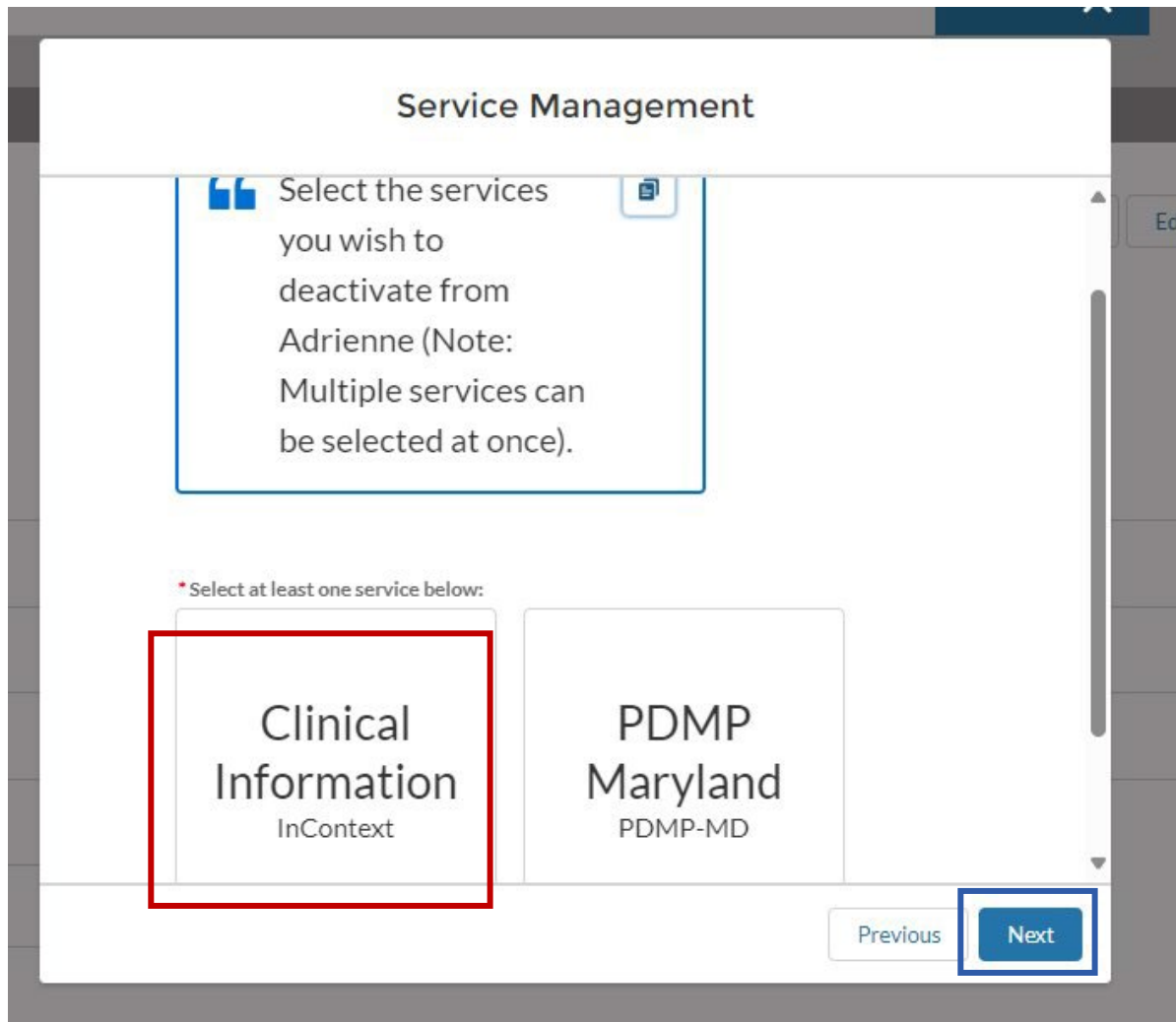
Service Management

\*Select Service Choices

Assign Services

Deactivate Services

Now, click on the *Service(s) you wish to deactivate*. Click *Next* and then *Finish*.



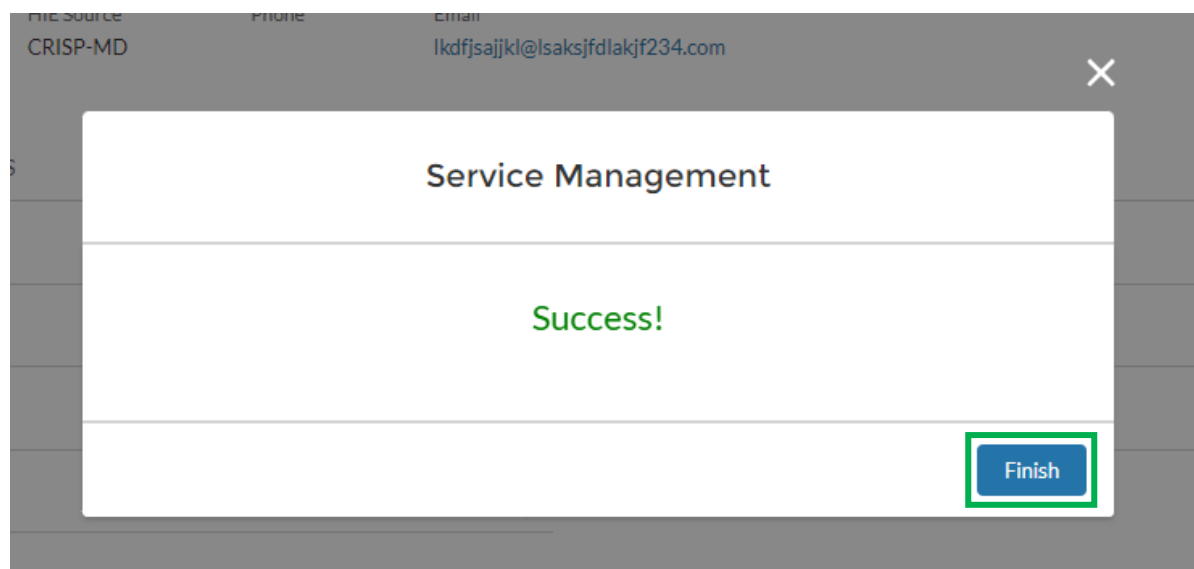
**Service Management**

Select the services you wish to deactivate from Adrienne (Note: Multiple services can be selected at once).

\* Select at least one service below:

<b>Clinical Information</b> InContext	<b>PDMP Maryland</b> PDMP-MD
--	---------------------------------

Previous **Next**



HIE Source: CRISP-MD Phone: Email: lkdfjsajjkl@lsaksjfdlakjf234.com







**Service Management**

**Success!**


**Finish**





## 8 Bulk Export User List

Start by choosing the Account you would like to view by clicking on the **Account Name**.

HOME ACCOUNTS ASSETS ADD USERS				
Accounts Recently Viewed 				
2 items • Updated a few seconds ago				
<input type="text" value="Search this list..."/>     				
Account Name	Industry	Billing City	Billing State/Province (text o...	
1 Jones Practice LLC	Ambulatory			
2 Partlow Medical	Ambulatory			

Next, click **User Export** on the top right tool bar. A pop-up window will appear.


**Account**  
**Interstellar LLC**

 Follow
  **User Export**
 New Note
  Audit

Website:   
 Industry: Ambulatory Medical

DETAILS ACTIVE USERS SUSPENDED USERS PANELS SERVICES

Account Name: \_\_\_\_\_ Account Owner: \_\_\_\_\_



From the pop-up window, 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.

ar LLC  
  
 Industry: Ambulatory Medical  
  
 USERS SUSPENDED  
  
 ckname

### User Export

This file export will contain a full list of Active and Suspended Users with sortable headers. We are providing you with a printable snapshot of your users for the purpose of making auditing decisions.

User ID	Account Name	First Name	Last Name	Email	Phone Number	Mobile Number	Member Title	Last Audit Date	Last Login Date
1	Interstellar LLC	John	Smith	john.smith@interstellar.com			Owner	1/1/2023	1/1/2023 14:00
2	Interstellar LLC	John	Smith	john.smith@interstellar.com			Owner	1/1/2023	1/1/2023 14:00
3	Interstellar LLC	John	Smith	john.smith@interstellar.com			Owner	1/1/2023	1/1/2023 14:00
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