



HIE Administrator Tool User Guide

April 2025

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Visit: CurrentCareRI.org/HIEadmin

Getting Started

- **Role of the Health Information Exchange (HIE) Administrator**
- **Each organization should have at least 2 persons in this role**
- **Importance of educating your staff about CurrentCare Access and Policies**



HIE Admin Roles & Responsibilities

Each organization should select **at least 2 persons** to serve in the role of HIE Administrator (HIE Admin).

| Role | Description | Resource/Comment |
|--|--|--|
| <i>Understand HIE Admin Role & Responsibilities</i> | Review HIE training materials in this training and on our website, or speak with our team. | CurrentCareRI.org/HIEAdmin |
| <i>Provide users with CurrentCare policies & educational materials</i> | Provide users with information about CurrentCare policies before their accounts are created | CurrentCareRI.org/Policies CurrentCareRI.org/HIEadmin |
| <i>Add user accounts</i> | Create user accounts in CurrentCare as directed by your practice management. | See the related section in this training |
| <i>Assign (Provision) services to user accounts</i> | Assign services to user accounts | See the related section in this training |
| <i>Perform user audits every 90 days</i> | Auditing each account is required every 90 days, or accounts will be suspended . If the account is not audited, it will automatically be deactivated at day 180. | Recommendation: Do this monthly to avoid user account suspensions. |
| <i>Manage Existing Users</i> | Update changes to user accounts & services, remove user accounts, reset user passwords | See the related section in this training |

Educate Your Staff

- Before you start to create user accounts, explain to your staff:
 - Your role as HIE Admin
 - Timeline for this implementation
 - Staff should prepare by learning about:

CurrentCare: CurrentCareRI.org

Policies and Patient Rights: CurrentCareRI.org/Policies

Training Materials: CurrentCareRI.org/Training

- Notify staff to look for an email from:
donotreply@hmetrix.com and that the email to set up their account expires in 72 hrs

***Tip: don't set up new users on a Friday,
as the activation email will expire on Monday!***

Adding User Accounts

- Add individual user accounts
- Upload a list of multiple users
- Use work emails when adding accounts



Accessing the HIE Admin Tool

1 Logging In

current care

© CRISP. All Rights Reserved. MY HIE ADMIN(S) SEND FEEDBACK PRODUCT UPDA

HOME Search Applications &

Q Patient Search

First Name * Last Name *

Date of Birth * Gender

SSN

Reset Search

Search Results

| First Name | Last Name | Date of Birth | Gender | Address | Match Score |
|------------------|-----------|---------------|--------|---------|-------------|
| No records found | | | | | |

Your Dashboard *For applications requiring patient context, please start by using the Patient Search interface above.*

- HIE Admin Tool
- Panel Processor
- CRI - Troubleshooting
- Panel Processor - Dev
- User Guide & Help

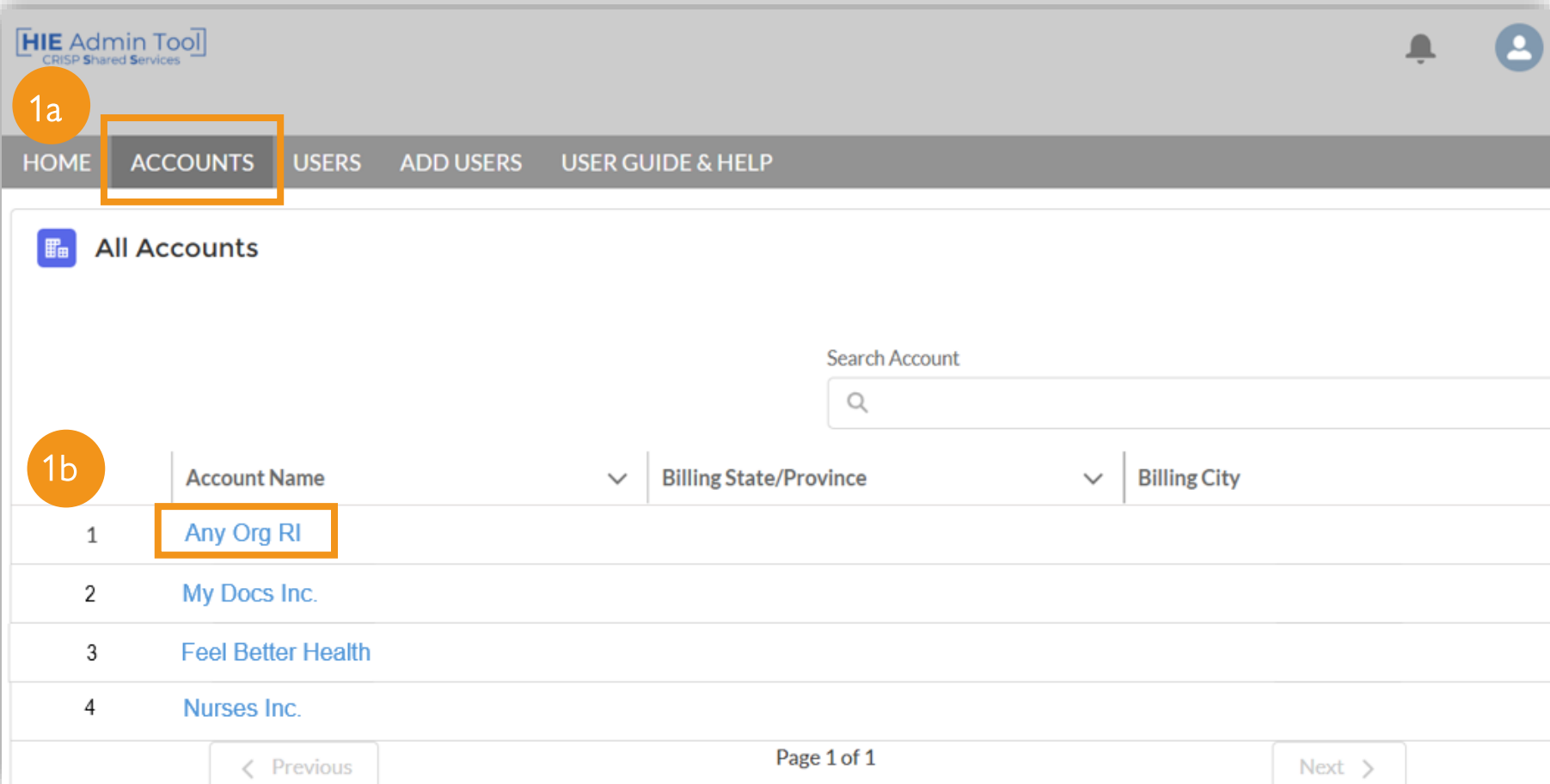
1 Log into your **CurrentCare Portal** account and click the **HIE Admin Tool** tile.

Navigate to Accounts

1 (1a) Select the **Accounts** tab.

Note: In most cases, organizations will only have one account. Occasionally, an organization may have multiple accounts.

(1b) Click the account name you need to work with.



The screenshot shows the HIE Admin Tool interface. The top navigation bar includes 'HOME', 'ACCOUNTS' (highlighted with an orange box and labeled '1a'), 'USERS', 'ADD USERS', and 'USER GUIDE & HELP'. Below the navigation bar, there is a section titled 'All Accounts' with a search bar labeled 'Search Account'. A table of accounts is displayed below the search bar, with the first row highlighted by an orange box and labeled '1b'. The table has columns for 'Account Name', 'Billing State/Province', and 'Billing City'. The first row contains the account name 'Any Org RI'. The second row contains 'My Docs Inc.', the third row contains 'Feel Better Health', and the fourth row contains 'Nurses Inc.'. At the bottom of the page, there is a 'Page 1 of 1' indicator and navigation buttons for 'Previous' and 'Next'.

| | Account Name | Billing State/Province | Billing City |
|---|--------------------|------------------------|--------------|
| 1 | Any Org RI | | |
| 2 | My Docs Inc. | | |
| 3 | Feel Better Health | | |
| 4 | Nurses Inc. | | |

Adding Individual Users

1 Selecting a Title

To provide access to HIE tools

(1a) Click the **Add Users** tab at the top of the home screen

(1b) Ensure **Single User** is selected

(1c) Select applicable **Title** from drop-down list

HOME ACCOUNTS USERS **ADD USERS**

1a

1b Single User Bulk User

1c *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

Adding Individual Users

2 Creating a New User

(2a) Complete the following fields. All fields marked with asterisks * are required. **NOTE: *User Type" will default to "Portal"**

2a

HOME
ACCOUNTS
USERS
ADD USERS

Bulk User
Unprocessed Users

* Title

* Organization

* User Type

Complete this field.

* First Name

* Last Name

* Email →

* Department

State License

- Each user must have a unique email;
- We recommend using the person's practice email

Adding Individual Users

3 Submitting a New User & Attestation

(3a) Click **Submit**

(3b) On the Attestation screen, check the boxes then click **Confirm**

(3c) A green pop-up box will confirm completion
(see next slide for error guidance)

The screenshot displays the 'ADD USERS' section of the application. The 'Single User' tab is active, showing a form with fields for Title, Organization, First Name, Last Name, Email, Department, State License, and Phone. A yellow callout box labeled '3a' highlights the 'Submit' button. An 'Important:' callout box provides instructions: 'Be sure to provide users with <https://CurrentCareRI.org/policies>. Use organizational emails for accounts; *personal emails are highly discouraged*. After the account is created, Email, First Name, Middle Name, and NPI cannot be modified for security reasons.' To the right, the 'Confirm' dialog is shown with two checked checkboxes and 'Confirm' and 'Cancel' buttons. A callout box labeled '3b' points to the 'Confirm' button. At the bottom right, a green success message pop-up labeled '3c' states 'Success New User created successfully!' with a close button.

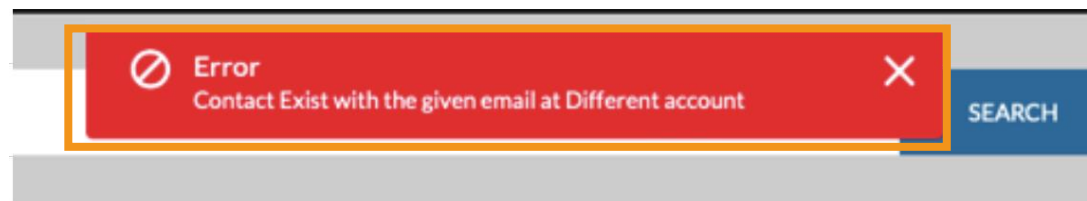
Adding Individual Users

4

- The system will verify the email address submitted for the new User.
- The system also sends an email to the user from donotreply@hmetrix.com.
Be sure to let users know about the email and that it expires in 72 hours
- If the email address is already in the system, you will receive an error message:

Contact exists with the given email at a different account

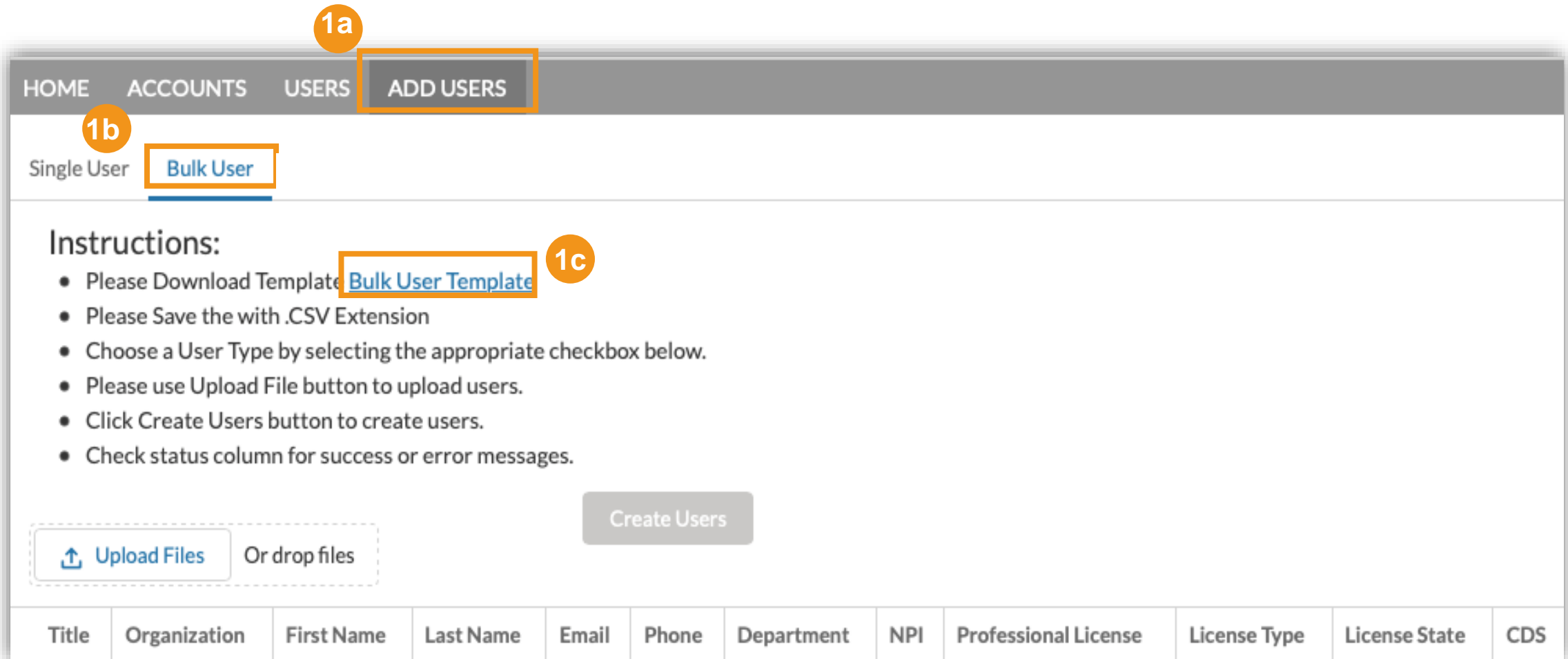
- This could be at an account you manage or another account within the system.
 - *Go to the Users tab and use the search feature to see if this user already exists in the system.*
 - *If you do not see the user listed, contact Technical User Support.*



Adding Multiple Users

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.



The screenshot shows a web interface for adding users. At the top, there is a navigation bar with tabs: HOME, ACCOUNTS, USERS, and ADD USERS. The 'ADD USERS' tab is highlighted with an orange box and labeled '1a'. Below the navigation bar, there are two tabs: 'Single User' and 'Bulk User'. The 'Bulk User' tab is highlighted with an orange box and labeled '1b'. Under the 'Bulk User' tab, there is an 'Instructions:' section. The first bullet point in the instructions is 'Please Download Template [Bulk User Template](#)', where the link is highlighted with an orange box and labeled '1c'. Below the instructions, there is a 'Create Users' button. At the bottom left, there is an 'Upload Files' button with an upward arrow icon and the text 'Or drop files'. At the bottom of the page, there is a table with the following columns: Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License, License Type, License State, and CDS.

Adding Multiple Users

- 2 Follow your browser's instructions to download the **Bulk User Template**.
 Note: it's an Excel file (.xlsx) with multiple tabs.

We've opened your file for quick and easy viewing right in Microsoft Edge. Choose Download file if you want to use it later. [Download file](#)

| | A | B | C | D | E | F | G | H | I | J | K | L | M |
|----|---------------------------------|---------------------|-------------------|------------------|--------------|--------------|-------------------|------------|-----------------------------|---------------------|----------------------|------------|------------|
| 1 | Member Title | Organization | First Name | Last Name | Email | Phone | Department | NPI | Professional License | License Type | State License | CDS | DEA |
| 2 | Cancer Registrar | Required | Required | Required | Required | Required | Required | NA | NA | NA | NA | NA | NA |
| 3 | Certified Nurse Midwife | Required | Required | Required | Required | Required | Required | Required | Applicable | Applicable | Required | Applicable | Applicable |
| 4 | Clinical Pharmacist | Required | Required | Required | Required | Required | Required | Required | Required | Required | Required | Applicable | Applicable |
| 5 | Dentist | Required | Required | Required | Required | Required | Required | Required | Required | Required | Required | Applicable | Applicable |
| 6 | Licensed Clinical Social Worker | Required | Required | Required | Required | Required | Required | Required | Required | Required | Required | Applicable | Applicable |
| 7 | LTC Consultant Pharmacist | Required | Required | Required | Required | Required | Required | Required | Required | Required | Required | Applicable | Applicable |
| 8 | Medical Assistant | Required | Required | Required | Required | Required | Required | NA | NA | NA | NA | NA | NA |
| 9 | Nurse Practitioner | Required | Required | Required | Required | Required | Required | Required | Required | Required | Required | Applicable | Applicable |
| 10 | Nursing Home Administrator | Required | Required | Required | Required | Required | Required | NA | NA | NA | NA | NA | NA |
| 11 | Nursing Home Other Staff | Required | Required | Required | Required | Required | Required | NA | NA | NA | NA | NA | NA |

User List **Required Fields by Title** Picklist +

- The **Required Fields by Title** tab shows required fields for each title. You don't need to enter anything here.

2a

- Click on the **User List** tab to enter information for each staff member.

2b

Search for tools, help, and more (Alt + Q)

File Home Insert Share Page Layout Formulas Data Review View Help Draw

12 B [Grid] [Color] [Font] [Align] [General] [Currency]

D3 [X] [Y] [fx]

| | A | B | C | D | E | F | G | H | I | J |
|---|-------|--------------|------------|-----------|-------|-------|------------|-----|----------------------|------------|
| 1 | Title | Organization | First Name | Last Name | Email | Phone | Department | NPI | Professional License | License Ty |
| 2 | | | | | | | | | | |
| 3 | | | | | | | | | | |

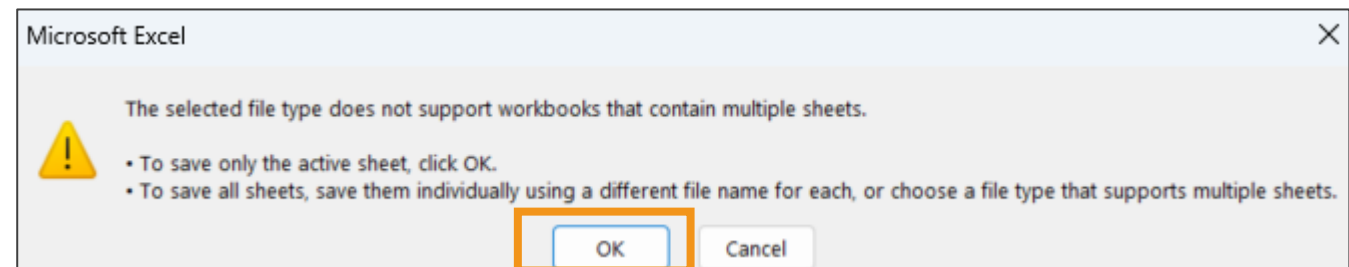
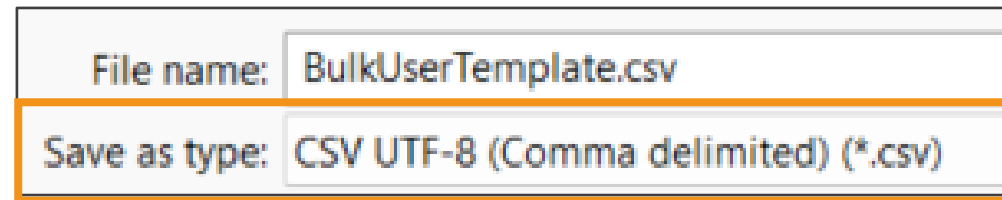
Adding Multiple Users

3 After entering all users, save the file as a **.CSV**:

After entering all staff members on the **User List** tab:

- Click **File**, click **Save As**
- In the **Save as type** dropdown, select:
CSV UTF-8 (Comma delimited) (*.csv)

Click **OK** to the warning that only the active sheet will be saved.



Adding Multiple Users

4 Uploading Files

(4a) Click **Upload Files** to select your .CSV file. (All other file formats will not be accepted)

*Note: Follow this same process to reactivate a user who is currently deactivated. Access to services for these users must be added again, see **the Adding Services** section for detailed instructions.*

The screenshot shows the 'ADD USERS' section of a web application. The navigation bar includes 'HOME', 'ACCOUNTS', 'USERS', and 'ADD USERS'. Under 'ADD USERS', there are three tabs: 'Single User', 'Bulk User' (which is selected), and 'Unprocessed Users'. Below the tabs, there are 'Instructions:' which include:

- 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.

 At the bottom of the instructions area, there is a '4a' callout pointing to an 'Upload Files' button (with an upload icon) and the text 'Or drop files'. To the right of this is a 'Create Users' button. Further right, there is a 'Portal (AK, CT, WV)' label with a checked checkbox. Below these elements is a table with the following headers: Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License, License Type, License State, and CDS.

Adding Multiple Users

5 Creating Users

(5a) Select **Create Users** to import your list into the HIE database

Single User **Bulk User** Unprocessed Users

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.

Template users.
 Portal
 or messages.

| 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 |

5a

Create Users

Adding Multiple Users

6 Submitting Updated Users & Attestation

(6a) Once you've selected **Create Users**, an attestation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click **Confirm**

(6b) 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 login credentials with another individual.

Confirm
Cancel

Message

1 successfully created
 0 failed Records

Reprocessing Users with Errors

7 Users with Errors

(7a) 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

(7b) Complete the indicated field updates and click the **Reprocess Users** button

- *Note: Any Users with uncorrected errors during this process will need to be entered individually in the Single User tab or in another Bulk upload.*
- *The window to update Users with errors will no longer be available after navigating away from this screen.*

The screenshot shows the 'ADD USERS' interface with the following elements:

- Navigation:** HOME, ACCOUNTS, USERS, ADD USERS
- Sub-tabs:** Single User, Bulk User (selected), Unprocessed Users
- 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.
- Buttons:** Upload Files, Or drop files, Create Users
- Table 1 (Main):**

| Title | Organization | First Name | Last Name | Email | Phone | Department | NPI | Professional License | License Type | License State | CDS | DEA | Status |
|------------------------|--------------|------------|-----------|-------|-------|------------|-----|----------------------|--------------|---------------|-----|-----|--------|
| Reprocess Users | | | | | | | | | | | | | |
- Table 2 (Error Details):**

| Error Message | Title | Organization | First Name | Last Name | PDMP Specialty |
|---------------------------|-----------|-------------------|------------|-----------|----------------|
| Please Provide Valide NPI | Physician | Junior Smoke Test | Yello70 | Clouds70 | |

Assigning Services

- Services must be added (assigned) to user's account
- Assigning services to a **single user**
- Assigning services to **multiple users**



Assigning Services - Overview

- After user accounts have been created, you must assign services to users
- HIE Admins can assign services to **individual** users, or to **multiple** users

The screenshot displays the current care web application interface. At the top, there is a navigation bar with the current care logo, copyright information, and user options like 'MY HIE ADMIN(S)', 'SEND FEEDBACK', 'PRODUCT UPDATES', 'MARGARET MENNA', and 'LOGOUT'. Below this is a search bar for 'Applications & Reports'. The main content area is divided into a search form on the left and a dashboard on the right. The search form includes fields for 'First Name', 'Last Name', 'Date of Birth', 'Gender', 'Address', and 'SSN', with a 'Search' button. The dashboard, titled 'Your Dashboard', contains several service tiles: 'Clinical Information Test', 'Clinical Information Demo', 'HIE Admin Tool', 'InContext Dev', 'Panel Processor', 'CRI - Troubleshooting', 'Panel Processor - Dev', and 'User Guide & Help'. A sidebar on the right shows a 'Population Explorer' panel with a 'Download' button and a message 'No notifications for this panel.'.

Services are sometimes called "Apps" or "Assets" and appear as "Tiles" on a user's landing page (Dashboard).

Assigning Services: Multiple Users

1 Provisioning a service for Multiple Users

(1a) Select the **Accounts** Tab

(1a) Select the Account associated with the Users who need access to a service

In most cases, the HIE Admin will most likely only be responsible for one account.

(1b) Select the **Services** tab

| 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 |

Account
Next Generation LLC

Website Industry
Ambulatory

DETAILS PANELS **SERVICES** ACTIVE USERS SUSPENDED USERS

Account Name
Next Generation LLC

Parent Account

Industry
Ambulatory

Assigning Services: Multiple Users

2 Select Service

The first column displays all services available for Admins to add to users of this account

(2a) Identify a service name that you want to add to multiple accounts

(2b) Click the **blue hyperlink** (to the right of the service name)

(2c) Click **Service Management** at the top right-hand corner

(2d) Click **Assign Services**

| Website | Industry |
|---------|------------|
| | Ambulatory |

| DETAILS | PANELS | SERVICES | ACTIVE USERS | SUSPENDED USERS |
|-------------------------------------|--------|---|--------------|-----------------|
| Services | | Org Service | | Status |
| HIE Portal | | Next Generation LLC - Portal | | Active |
| Clinical Information | | Next Generation LLC - InContext | | Active |
| Referrals | | Next Generation LLC - ReferralUI | | Active |
| Prescriber Reports | | Next Generation LLC - PrescriberReports | | Active |
| COVID-19 Lab Tools | | Next Generation LLC - COVIDLabTools | | Active |
| Snapshot | | Next Generation LLC - Snapshot | | Active |
| Clinical | | Next Generation LLC - Clinical | | Active |
| Unified Landing Page (ULP) | | Next Generation LLC - ULP | | Active |
| Encounter Notification System (ENS) | | Next Generation LLC - ENS | | Active |

| Account | Contact | Product | Status | Install Date |
|-------------------------------------|---------|--------------------------|--------|--------------|
| Next Generation LLC | | Snapshot | Active | 1/11/2022 |

| DETAILS | RELATED |
|-------------------------------------|---------------------|
| Asset Name | Status |
| Next Generation LLC - Snapshot | Active |
| Account | Install Date ⓘ |
| Next Generation LLC | 1/11/2022 |
| Usage End Date | Deactivation Reason |
| | |

Service Management

*Select Service Choices

Assign Services
2d

Deactivate Services

Assigning Services: Multiple Users

3 Select Users

Select Users:

(3a) Select the User(s) for whom you are granting access to this service by checking the box next to their name

(3b) Click **Confirm Selections**

Assign Service

Assign Snapshot Service

✓
Select Users
Confirm Selections
Complete!

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"/> | <input type="checkbox"/> Name | <input type="checkbox"/> Email |
|---|-------------------------------------|-------------------------------|--------------------------------|
| 1 | <input type="checkbox"/> | Aalnerer1 chestington1 | aalnerer1chestingt... |
| 2 | <input checked="" type="checkbox"/> | Aalnerer10 chestingto... | aalnerer10chestingt... |
| 3 | <input type="checkbox"/> | Aalnerer100 chestingt... | aalnerer100chestingt... |
| 4 | <input checked="" type="checkbox"/> | Aalnerer101 chestingt... | aalnerer101chestingt... |

Page 1 of 10.
< >

Showing 1 to 50 of 488 records.

3b
Confirm Selections

Assigning Services: Multiple Users

4 Confirm Selections

Confirm Selections:

(4a) Review and confirm the list of users you selected

(4b) click **Complete!**

(4c) Success! You have provisioned access of a service to multiple users, Click **Finish**

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!

Assign Service

Assign Snapshot Service

Select Access
✓
✓
Complete!

Success!

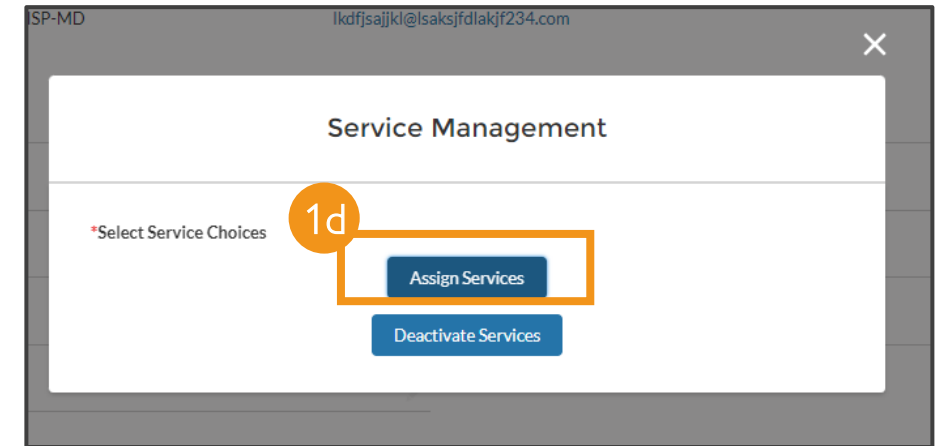
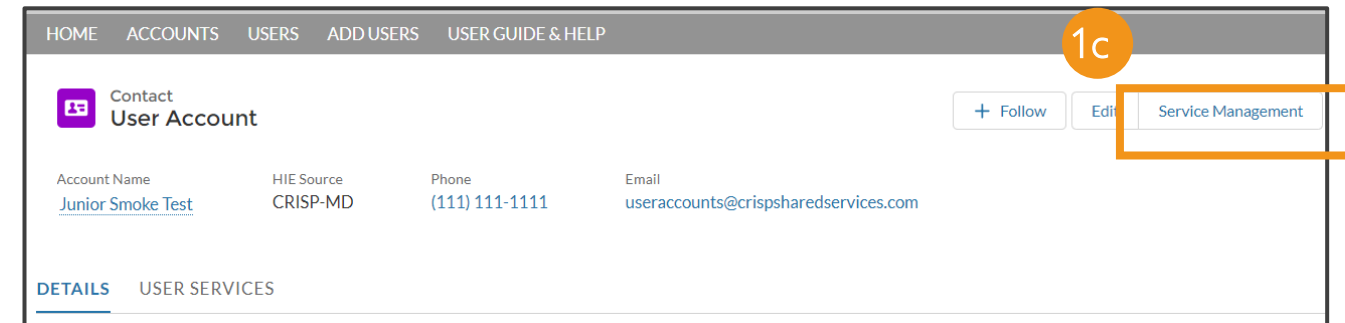
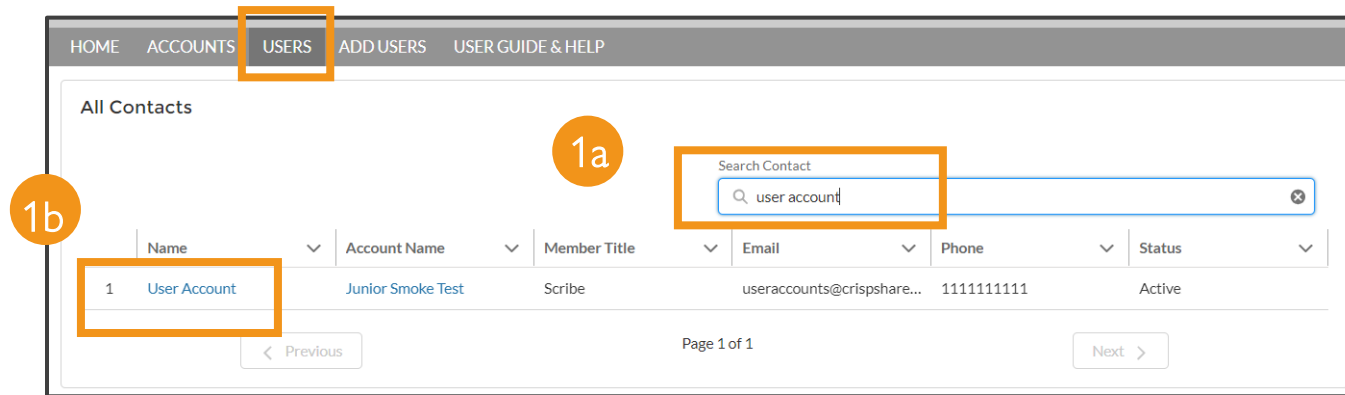
Finish

[Return to](#)

Assigning Services: Single User

1 Assign Services

- (1a) Click the **Users** tab
- (1b) Click on the User's name
- (1c) Select **Service Management** at the top right corner of the screen
- (1d) Select **Assign Services**



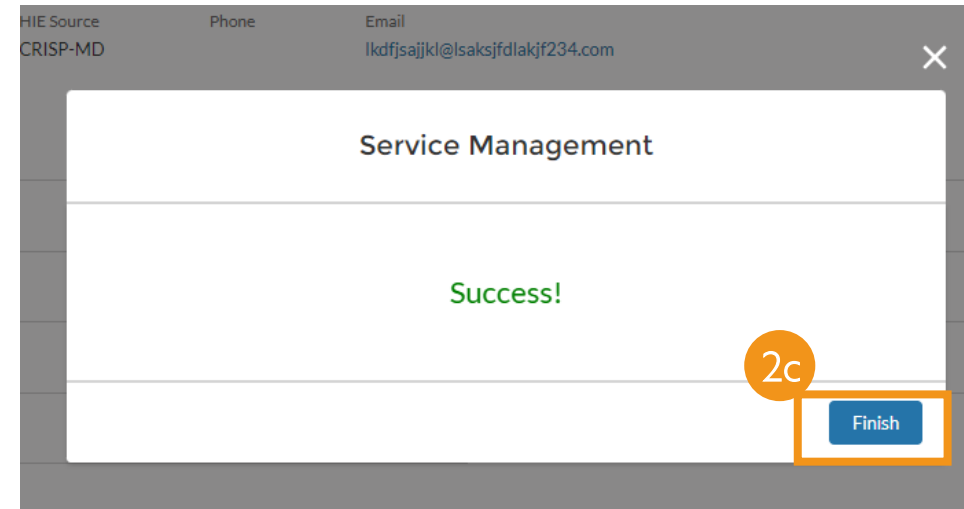
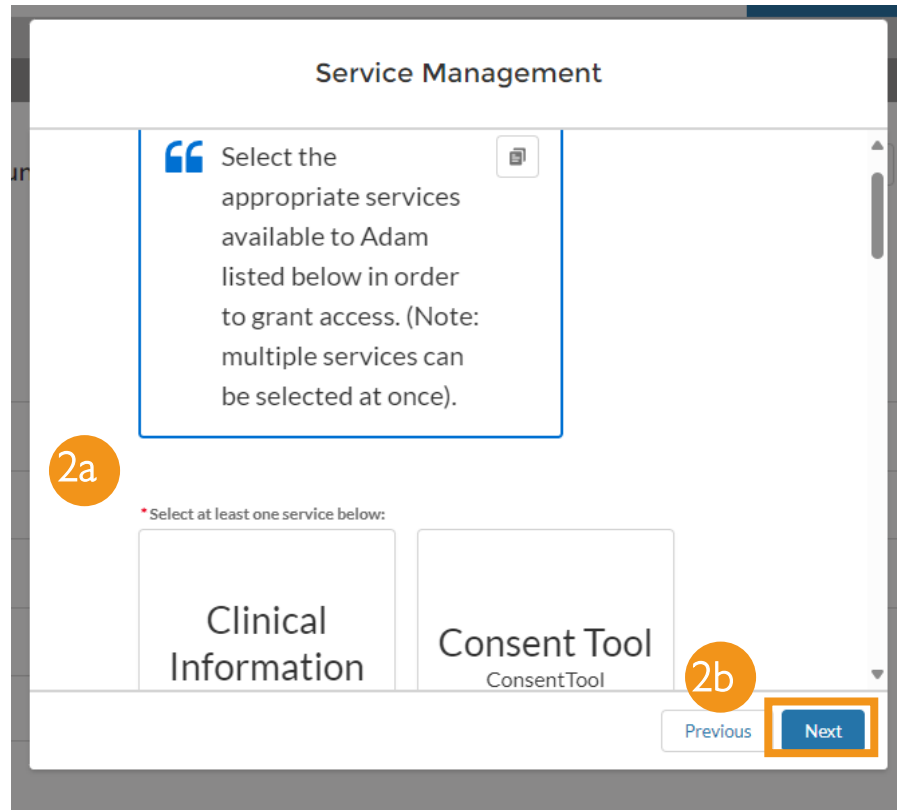
Assigning Services: Single User

2 Assign Services

(2a) Select the service you wish to assign to the user

(2b) Click **Next**

(2c) Click **Finish**



User Audits

- are required every 90 days otherwise, users will be **suspended**
- at day 180, if still not audited, account will be **deactivated**



User Audits

- You must audit each user every 90 days
 - TIP: We recommend that you do this *monthly!*
- You will receive monthly reminder emails
- If a user is not verified within 90 days, their account will be **suspended**.
An HIE Admin can approve a suspended user (see slides in this section).

- At 180 days, a suspended user will become **deactivated**.
Deactivated users cannot be reset by the HIE Admin;

HIE Admin will need to submit a service request:

*888.858.4815 or
 Support@CurrentCareRI.org*

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Sandbox: HIE Admin Monthly Audit Reminder

noreply@salesforce.com on behalf of Salesforce CRISP <jennifer.jones

To Penny Lane

Wed 10/16/2024 11:35 AM

Follow up. Start by Wednesday, October 16, 2024. Due by Wednesday, October 16, 2024.

Hello,

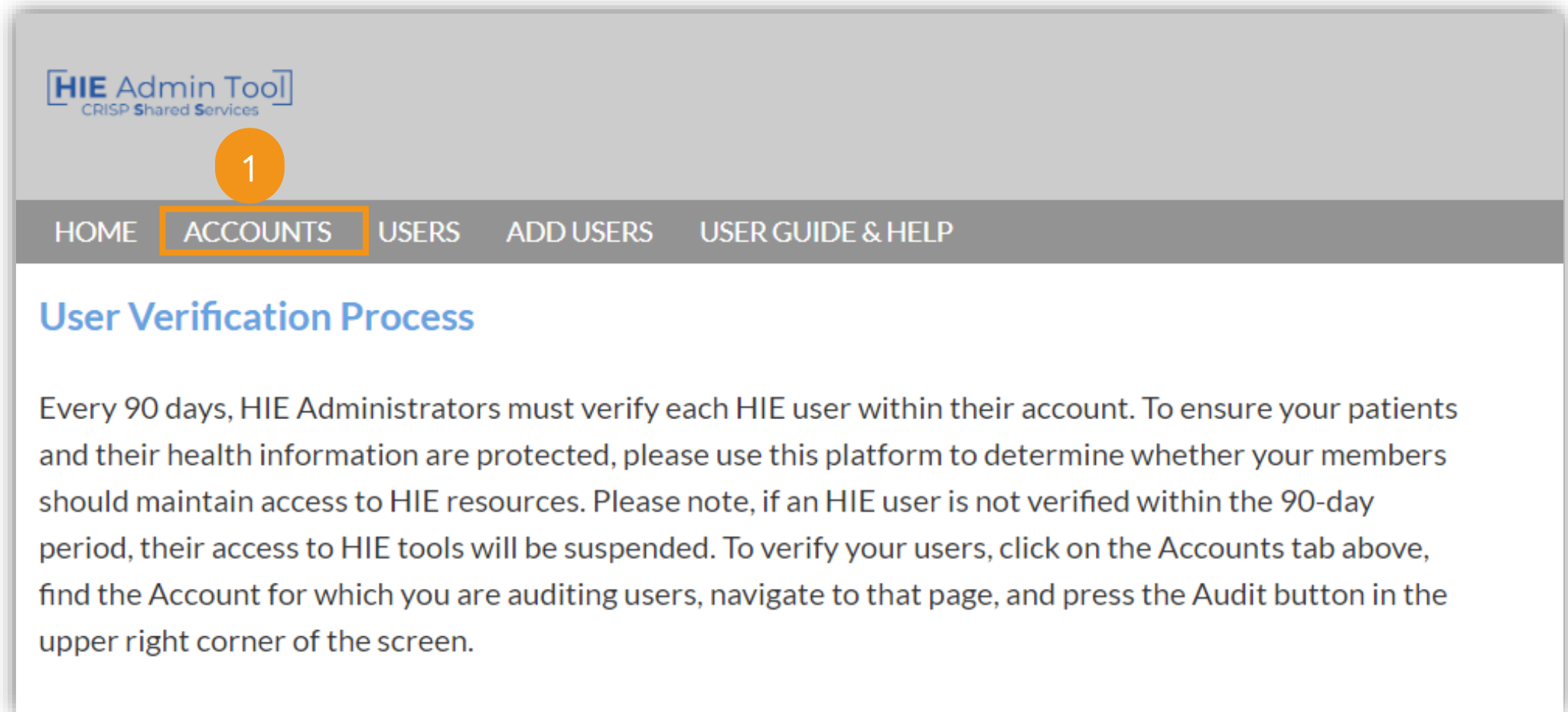
This is a monthly reminder that you are the HIE Administrator for your organization.

As the designated HIE Administrator, you are authorized to approve, deny or create user access to our services. You are required to verify each unique user within your organization at least once every 90 days (4 times per year).

If a user has not been verified within the preceding 90-day time frame, their account will automatically be **suspended** and they will not be able to access HIE Services. Users who lose access will be notified to contact you for restoration of services. Access can be restored within 30 days of suspension by verifying the user in the Suspended Users tab in the Account Audit of the HIE Admin Tool.

User Audits

- 1 From the HIE Admin tool, click the Accounts tab.



The screenshot shows the HIE Admin Tool interface. At the top left, the logo reads "HIE Admin Tool" with "CRISP Shared Services" underneath. A navigation bar contains the following tabs: HOME, ACCOUNTS, USERS, ADD USERS, and USER GUIDE & HELP. The "ACCOUNTS" tab is highlighted with an orange border and a small orange circle containing the number "1" above it. Below the navigation bar, the main content area has a blue heading "User Verification Process". The text below the heading reads: "Every 90 days, HIE Administrators must verify each HIE user within their account. To ensure your patients and their health information are protected, please use this platform to determine whether your members 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. To verify your users, click on the Accounts tab above, find the Account for which you are auditing users, navigate to that page, and press the Audit button in the upper right corner of the screen."

User Audits - Select an Account

1 Select an Account

(1a) In the **Accounts** tab, click the account name you would like to audit.
Reminder: This could be your organization name or a different site name

(1b) Select **Audit** option in the top-right of your screen

1a

HOME ACCOUNTS ASSETS ADD USERS

Accounts
Recently Viewed ▾

2 items • Updated a few seconds ago

Search this list...

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

1b

HOME ACCOUNTS USERS ADD USERS

Account
Jones Practice LLC

+ Follow New Note **Audit**

| Phone | Website | Type | Industry | Account Owner |
|-------|---------|------|------------|-------------------------------|
| | | | Ambulatory | Outreach Team |

DETAILS RELATED

User Audits - Active Users

2 Auditing Active Users

(2a) You should default to the **Active User** tab.

(2b) To approve all users on this page, select **Approve Current Page** on the top right
You will immediately see the green success message

(2c) For individual users, select either **Approve** or **Deny**

(2d) Select **Complete Audit**

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.

2a

Active User

Suspended User

2b

Approve Current Page

| Active Users | | | | | | |
|--|----------------|----------------------|--------------|------------|------------|----------|
| Status | Name | Email | Member Title | Department | Audit Date | Audit By |
| 2c <div style="display: inline-block; margin-left: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; font-weight: bold; margin-right: 5px;">Approve</div> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; font-weight: bold; margin-right: 5px;">Deny</div> </div> | HIE AdminEmail | mpartlow@avideon.com | | | | |
| <div style="display: inline-block; margin-left: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; font-weight: bold; margin-right: 5px;">App</div> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; font-weight: bold; margin-right: 5px;">Deny</div> </div> 2c | Juan Gonzalez | | | | | |

Complete Audit

Cancel

2d

✔ Success
 All records Successfully Updated
 ✕

User Audits - Active Users

- 3 If you selected individuals (vs. "Approve Current Page"), click **Finish**; The green **Success** prompt will appear

HIE Admin - User Confirmation Page

| Deactivated Users | |
|-------------------|----------------------|
| Name | Email |
| sherlock sherlock | holmes52@asdadas.com |

| Active Users | |
|-----------------|----------------------------|
| Name | Email |
| pencil2 eraser2 | pencil2eraser2@gkjdsld.com |

3

Best Practice:

- If an employee leaves your organization or is terminated, you should deny access as soon as possible;
- We recommend adding this step to a checklist to use when employees leave your organization.

✓ Success
✕

All records Successfully Updated

User Audits - Suspended Users

3 Managing Suspended Users

(3a) Ensure the **Suspended User** tab is selected
 (3b) If *suspended users* are listed, select the appropriate indicator to **Approve** or **Deny** the user.

*If denied, the user account will be **revoked***

(3c) Click **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 <input type="button" value="Approve"/> <input type="button" value="Deny"/> | Laughter Ajibade | laughter@test.com | Nurse Practitioner | | 2021-03-16 | 2021-03-16 |
| <input type="button" value="Approve"/> <input type="button" value="Deny"/> | Peter Shay | shay@test.com | Physician, Intern | | 2021-03-17 | 2021-03-17 |
| <input type="button" value="Approve"/> <input type="button" value="Deny"/> | Test Thu1 | testthu1@test.com | Dentist | | 2021-03-17 | 2021-03-17 |
| <input type="button" value="Approve"/> <input type="button" value="Deny"/> | Nick Redfurn | nick@test.com | | | 2021-03-18 | 2021-03-18 |
| <input type="button" value="Approve"/> <input type="button" value="Deny"/> | test singleuser | test@sunuser.com | Dentist | | 2021-03-18 | 2021-03-18 |

3c

User Audits - Bulk Export User List

1 Choosing an Account

- (1a) Choose the account you would like to view by clicking on the name in the **Account Name** column
- (2) Click **User Export** on the top right tool bar

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Accounts Recently Viewed +

2 items • Updated a few seconds ago

Search this list...

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

Account Interstellar LLC

+ Follow User Export New Note Audit

Website Industry Ambulatory Medical

DETAILS ACTIVE USERS SUSPENDED USERS PANELS SERVICES

Account Name Account Owner

User Audits - Bulk Export User List

3

Click the **Export** link to confirm the Excel download.

Note: the file will contain a full list of Active and Suspended Users

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.

3

Export

Cancel

| A | B | C | D | E | F | G | H | I | J |
|-------------|------------------|-----------|----------|----------------------------------|--------------|---------------|---------------------|-----------------|-----------------|
| User Status | Account Name | FirstName | LastName | Email | Phone Number | Mobile Number | Member Title | Last Audit Date | Last Login Date |
| Suspended | Interstellar LLC | Green9 | Grapes9 | jennifer.jones@crisphealth.org | | | Scribe | 2/2/2023 | 9/26/2023 12:00 |
| Suspended | Interstellar LLC | dog2 | gosh2 | dog2gosh2@lkajdfakjf2342.com | | | Scribe | 3/2/2023 | |
| Active | Interstellar LLC | dog3 | gosh3 | dog3gosh3@lkajdfakjf2342.com | | | Pharmacist | 3/2/2023 | 9/18/2023 12:00 |
| Suspended | Interstellar LLC | dog5 | gosh5 | dog5gosh5@lkajdfakjf2342.com | | | Scribe | 3/2/2023 | 9/27/2023 12:00 |
| Suspended | Interstellar LLC | dog16 | gosh16 | dog16gosh16@lkajdfakjf2342.com | | | Scribe | 1/23/2023 | |
| Suspended | Interstellar LLC | dog17 | gosh17 | dog17gosh17@lkajdfakjf2342.com | | | Scribe | 1/23/2023 | |
| Suspended | Interstellar LLC | dog21 | gosh21 | dog21gosh21@lkajdfakjf2342.com | | | Scribe | 1/23/2023 | |
| Suspended | Interstellar LLC | dog22 | gosh22 | dog22gosh22@lkajdfakjf2342.com | | | Scribe | 1/23/2023 | |
| Suspended | Interstellar LLC | dog23 | gosh23 | dog23gosh23@lkajdfakjf2342.com | | | Scribe | 1/23/2023 | |
| Suspended | Interstellar LLC | dog24 | gosh24 | dog24gosh24@lkajdfakjf2342.com | | | Scribe | 1/18/2023 | |
| Suspended | Interstellar LLC | dog25 | gosh25 | dog25gosh25@lkajdfakjf2342.com | | | Scribe | 1/24/2023 | |
| Suspended | Interstellar LLC | dog28 | gosh28 | dog28gosh28@lkajdfakjf2342.com | | | Scribe | 2/1/2023 | |
| Suspended | Interstellar LLC | dog29 | gosh29 | dog29gosh29@lkajdfakjf2342.com | | | Scribe | 2/2/2023 | |
| Suspended | Interstellar LLC | dog41 | gosh41 | dog41gosh41@lkajdfakjf2342.com | | | Physician | 1/18/2023 | |
| Active | Interstellar LLC | dog43 | gosh43 | dog43gosh43@lkajdfakjf2342.com | | | Physician | 9/8/2023 | |
| Suspended | Interstellar LLC | dog50 | gosh50 | doggoshedit1251@gmail.com | 8977890789 | | Physician, Resident | 2/2/2023 | |
| Active | Interstellar LLC | dog67 | gosh67 | dog67gosh67@lkajdfakjf2342.com | | | OCME Investigator | 9/8/2023 | NA |
| Suspended | Interstellar LLC | dog100 | gosh100 | dog100gosh100@lkajdfakjf2342.com | | | Physician | 1/25/2023 | |

Managing Existing Users

Edit User Details

Deactivating Services for a Single User

Viewing Services for a Single User

Password or Activation Email Reset



Editing User Details

1 Selecting a Contact

(1a) Go to **Users** tab

(1b) Enter name or email in the search box and click enter

The screenshot shows the 'HIE Admin Tool' interface with the 'USERS' tab selected. A search box labeled 'Search Contact' is highlighted with an orange box and labeled '1b'. Below the search box is a table of contacts with columns for Name, Account Name, Member Title, Email, Phone, and Status. The table contains five rows of contact information.

| | Name | Account Name | Member Title | Email | Phone | Status |
|---|---------------|--------------|--------------|-----------------|-------|--------|
| 1 | John Most | AnyOrgUsa | Physician | jmost@AOU.org | | Active |
| 2 | Ann Levy | AnyOrgUsa | Physician | alevy@AOU.org | | Active |
| 3 | Sarah Golden | AnyOrgUsa | Physician | sgolden@AOU.org | | Active |
| 4 | Tracey Mackey | AnyOrgUsa | Physician | tmackey@AOU.org | | Active |
| 5 | Karen Thomas | AnyOrgUsa | Physician | kthomas@AOU.org | | Active |

Editing User Details

2 Selecting a Contact

Click the name in the search result to view that person's information.

The screenshot shows the 'HIE Admin Tool' interface with a navigation menu (HOME, ACCOUNTS, USERS, ADD USERS, USER GUIDE & HELP) and a search bar labeled 'Search Contact' containing the text 'Most'. Below the search bar is a table titled 'All Contacts' with columns: Name, Account Name, Member Title, Email, Phone, and Status. The first row of the table is highlighted with an orange box, showing 'John Most' as the Name, 'AnyOrgUsa' as the Account Name, 'Physician' as the Member Title, and 'jmost@AOU.org' as the Email. A circled '2' is placed next to the 'John Most' name in the table.

| | Name | Account Name | Member Title | Email | Phone | Status |
|---|-----------|--------------|--------------|---------------|-------|--------|
| 1 | John Most | AnyOrgUsa | Physician | jmost@AOU.org | | Active |

Editing User Details

3 Editing and Saving a Contact's Information

- (3a) Select **Edit** to update the contact's information
- (3b) Select **Save** to confirm the updated information

NOTE: HIE Admins may only edit existing user's Last Name, Salutation, Suffix and Phone Number.

To edit an existing user's e-mail, please contact CurrentCare Support OR deactivate the current user account and create a new one with the user's updated e-mail.

HOME ACCOUNTS USERS ADD USERS

Contact **Ronald Test**

+ Follow **Edit** Assign Services Suspend U

| Title | Account Name | Phone (2) ▼ | Email | Contact Owner |
|-------|--------------------|-------------|-------|---------------|
| | Jones Practice LLC | | | Aideon CRISP |

DETAILS RELATED

| | |
|--------------------|---------------|
| Name | Contact Owner |
| Ronald Test | Aideon CRISP |
| Account Name | Contact Type |
| Jones Practice LLC | |

Edit Contact

* Name Contact Owner Jennifer Jones

Salutation --None--

First Name John

Middle Name

* Last Name Doe

Suffix

Account Name Next Generation LLC Email johndoe1234@email1234.com

Member Title Nursing Home Administrator Phone 2223332222

Department Picklist 1 Cancer Registry Mobile 2223332222

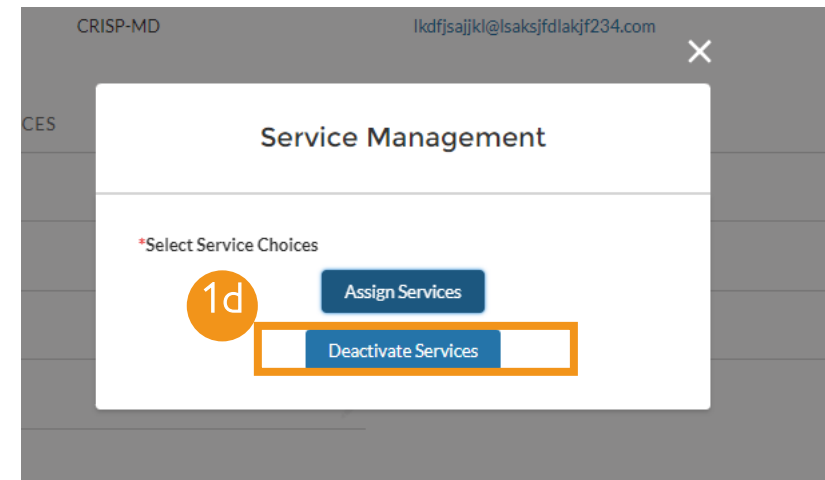
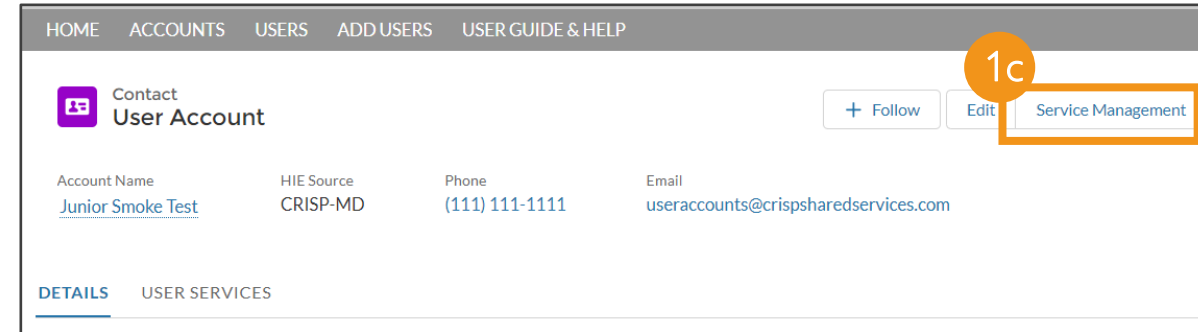
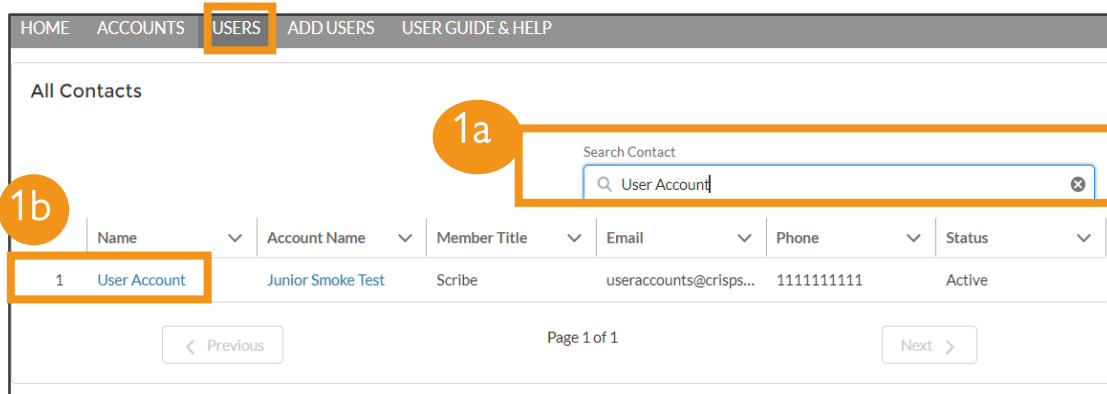
User Status 1 Active

Cancel Save & New **Save**

Deactivating Services: Single User

1 Deactivating a service for a single User

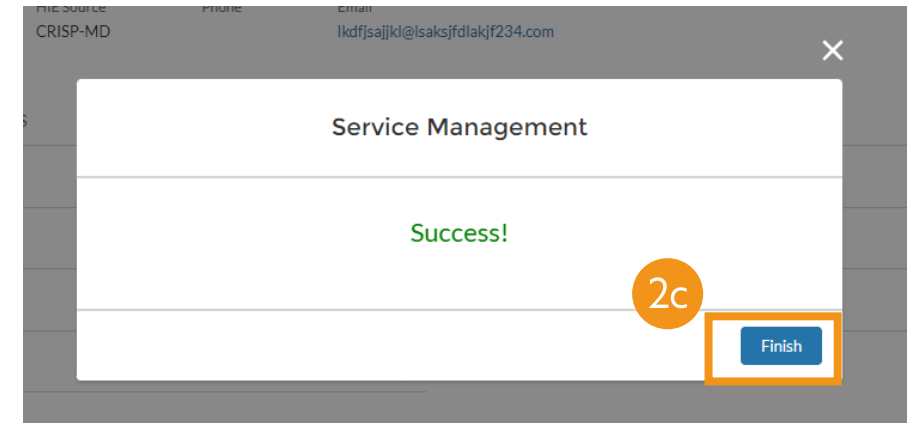
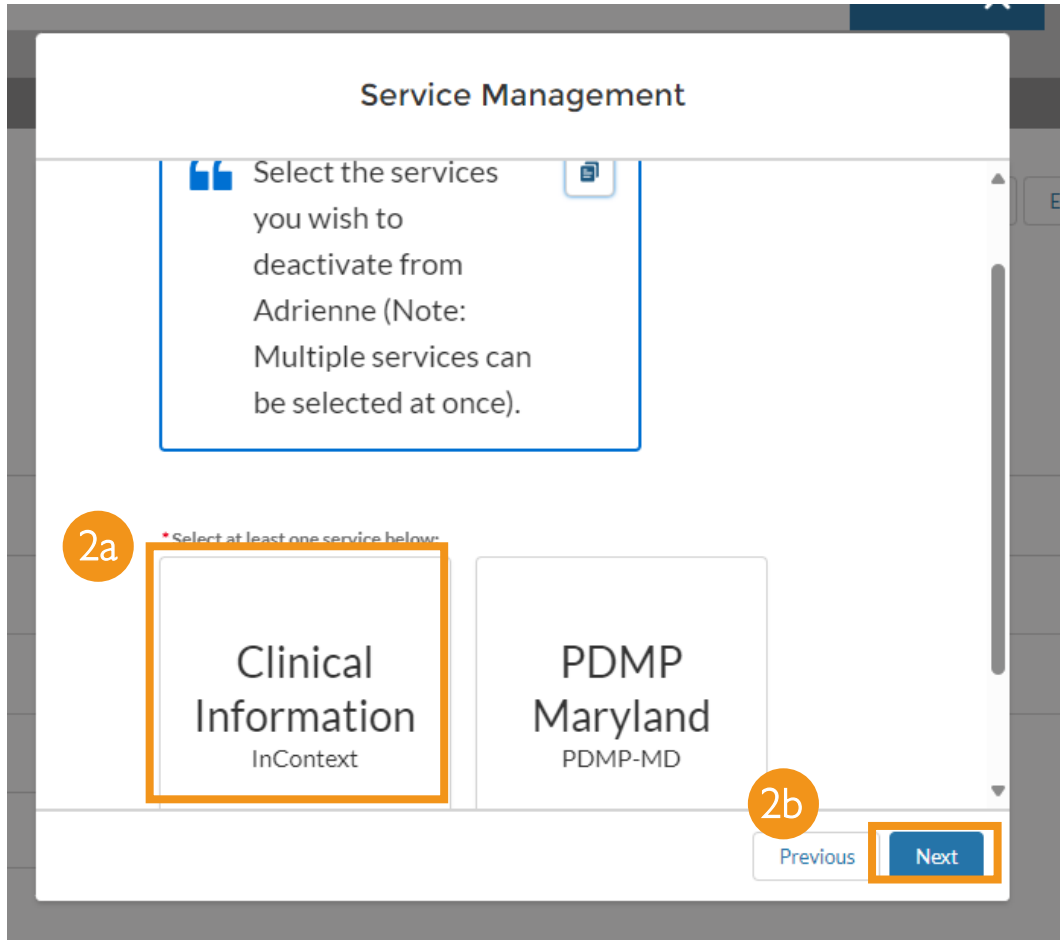
- (1a) Click the **Users** tab and search for the user's name
- (1b) Click on the user's name
- (1c) Click **Service Management**
- (1d) Click **Deactivate Services**



Deactivating Services: Single User

2 Deactivating a service for a single User

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



Viewing Services for a Single User

Go to the **Users** tab, search for and then select a user.

Once in the user's contact record,

(1a) Click on the **User Services** Tab

(1b) Click **View All** to see the complete list of services for this user.

The screenshot shows a user profile for Penny Lane. The navigation bar includes HOME, ACCOUNTS, USERS, ADD USERS, and USER GUIDE & HELP. The user's contact information is displayed, including Account Name (AnyOrgRI), HIE Source (AnyOrgRI), Phone ((111) 111-1111), and Email (PennyLane@AnyOrgRI.org). The USER SERVICES tab is highlighted with an orange box and labeled '1a'. Below the tab, there is a section for 'User Services (3)' with a table of services. A 'View All' button is highlighted with an orange box and labeled '1b'.

| Service | User Services | Status | Username | Activation Date |
|----------------------|--|--------|------------------------|-----------------|
| Snapshot | PennyLane - AnyOrgRI.org - Snapshot | Active | | 6/14/2024 |
| Clinical Information | PennyLane - AnyOrgRI.org - InContext | Active | | 6/14/2024 |
| HIE Portal | PennyLane - AnyOrgRI.org - Portal | Active | PennyLane@AnyOrgRI.org | 6/14/2024 |

HIE Portal - Password or Activation Email Reset

User Password or Activation Email Reset

From the **Users** tab, search for a specific user and click on the user name.

(1a) Click on **User Services** tab

(1d) Click **View All** to expand view

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Contact Penny Lane + Follow Edit Service Management

Account Name: AnyOrgRI | HIE Source: AnyOrgRI | Phone: (111) 111-1111 | Email: PennyLane@AnyOrgRI.org

DETAILS **USER SERVICES** 1a

User Services (3)

| Service | User Services | Status | Username | Activation Date |
|----------------------|--|--------|------------------------|-----------------|
| Snapshot | PennyLane - AnyOrgRI.org - Snapshot | Active | | 6/14/2024 |
| Clinical Information | PennyLane - AnyOrgRI.org - InContext | Active | | 6/14/2024 |
| HIE Portal | PennyLane - AnyOrgRI.org - Portal | Active | PennyLane@AnyOrgRI.org | 6/14/2024 |


View All 1a

HIE Portal - Password or Activation Email Reset

2 User Password or Activation Email Reset

(2a) Click on the blue hyperlink name in the *User* column associated with **Portal only**:

User Name - Account name - Portal

| DETAILS | | USER SERVICES | | |
|--|--|---------------|------------------------|-----------------|
|  User Services (3) | | | | |
| Service | User Services | Status | Username | Activation Date |
| Snapshot | PennyLane - AnyOrgRI.org - Snapshot | Active | | 6/14/2024 |
| Clinical Informa | PennyLane - AnyOrgRI.org - InContext | Active | | 6/14/2024 |
| HIE Portal | PennyLane - AnyOrgRI.org - Portal | Active | PennyLane@AnyOrgRI.org | 6/14/2024 |

2a

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 account is already activated

(3c) Read the instructions then click on **Confirm Reset**

The screenshot displays the HIE Portal interface with three callout boxes illustrating the reset process:

- 3a:** A callout box highlights the "HIE Portal User Management" link in the top navigation bar.
- 3b:** A callout box highlights the "Reset Password" and "Resend Activation Link" buttons in a pop-up window titled "HIE Portal User Management".
- 3c:** A callout box highlights the "Confirm Reset" button in a detailed instruction pop-up window titled "HIE Portal User Management".

The detailed instruction pop-up (3c) contains the following text:

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

Resources



Learn more at:

- CurrentCareRI.org
- CurrentCareRI.org/HIEadmin
- CurrentCareRI.org/Policies
- CurrentCareRI.org/Training

Contacts

CurrentCareRI.org
Support@CurrentCareRI.org
888-858-4815

