

KHIE Admin Tool Training

February 2026



Agenda

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- 5 Creating Multiple Users
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- 7 Provisioning Services
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- 9 Managing Existing Users
- 10 Auditing Multiple Accounts
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KHIE

CRISP
Shared Services

Overview



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 for added security.



Important Terms



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.
- » **KHIE 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 calling HIE Technical User Support Team at the number located at the beginning of this guide.



Accessing the Tool



1 Logging In

First Time HIE Admin Users: If this is your first time accessing the Tool, refer to your welcome email for instructions. You are required to create a password and set up two-factor authentication on your account. Enter your login credentials in the fields provided.

Existing HIE Admin Users:

Log on to your HIE portal account.

(1a) After logging in, navigate to the "HIE Admin Tool" tile. There you will see the screen below. First, let's verify your users. Select the Accounts tab to begin



WELCOME!

User Verification Process



Creating Individual Users



1

Selecting a Title

- (1a) To provide access to HIE tools, click the *Add Users* tab at the top of the home screen
- (1b) Ensure "Single User" is underlined
- (1c) Select applicable Title from drop-down list

HOME ACCOUNTS USERS **ADD USERS**

Single User Bulk User

*Title

-None-

Complete this field.

Submit Cancel

1c

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



2

Creating a New User

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

NOTE: *User Type – select “Portal”

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User

2a

Title
Other Licensed Healthcare Practitioner

* Organization
--None--

* User Type
--None--

Complete this field.

* First Name

* Last Name

* Email

* Department
--None--

State License
--None--

Submit Cancel



3

Submitting a New User & Attestation

- (3a)** Once all required fields are filled out press the Submit button at the bottom the form
- (3b)** After you click *Submit*, an attestation screen will appear, acknowledge the terms and conditions by clicking the check boxes then click *Confirm*
- (3c)** A green pop-up message will appear once User has been successfully onboarded (see next slide for error guidance)

NOTE: It is highly recommended adding the User's organizational email. Personal emails are discouraged. After user creation, Email, First Name, Middle Name, and NPI cannot be modified for security reasons.

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User

* Title
Other Licensed Healthcare Practitioner

* Organization
--None--

* User Type
--None--

* First Name
[]

* Last Name
[]

* Email
[]

* Department
--None--

State License
--None--

Phone
[]

3a

Confirm

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

I attest that the organization has a copy of the Health Information Exchange (HIE) participation agreement and the corresponding policies and procedures found on the HIE website. In addition, I attest that all Authorized Users have received education or training on the HIE policies and procedures as applicable and have agreed to adhere to those applicable to Authorized Users, including the prohibition against sharing log-in credentials with another individual.

3b

3c **Success**
New User created successfully!



4

New User Creation Error

(4a) Reference from previous slide: Once attestations are checked and you click Confirm, the system will verify the email address submitted on the new User creation request

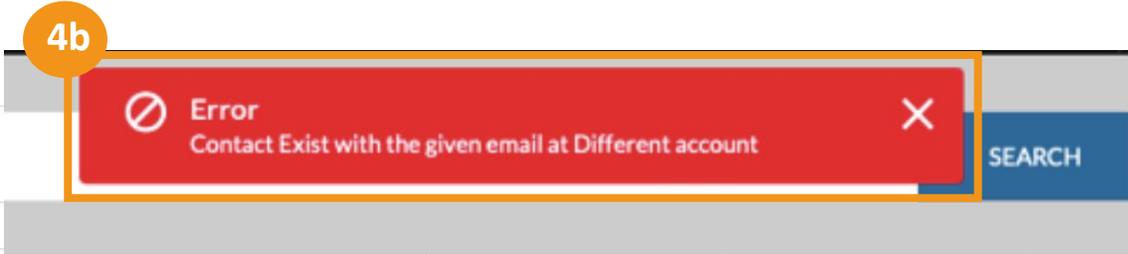
(3b) Upon attempt to create a new User with an email address that is already in the system, you will receive an error message: **Contact Exists with the given email at a different account.** This could be at an account you manage or another account within the system. **Search for the User in accounts that you manage – see User Search section. If the User does not exist in an account you manage, contact Technical User Support**

Confirm

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

- I attest that the organization has a copy of the Health Information Exchange (HIE) participation agreement and the corresponding policies and procedures found on the HIE website. In addition, I attest that all Authorized Users have received education or training on the HIE policies and procedures as applicable and have agreed to adhere to those applicable to Authorized Users, including the prohibition against sharing log-in credentials with another individual.

4a



Creating 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 tab

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.

Or drop files

User Type: Portal

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



2

Uploading Files

(2a) 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.

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.

2a

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
-------	--------------	------------	-----------	-------	-------	------------	-----	----------------------	--------------	---------------	-----	-----	--------



3 Creating Users

(3a) 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

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 Submitting Updated Users & Attestation

(4a) Once you've selected Create Users, an attestation screen will appear. Acknowledge the terms and conditions by clicking the check boxes then click *Confirm*

(4b) 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 log-in credentials with another individual.

4b

Message

1 successfully created
0 failed Records

4a

Confirm Cancel



5

Users with Errors

(5a) 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

(5b) 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
-------	--------------	------------	-----------	-------	-------	------------	-----	----------------------	--------------	---------------	-----	-----	--------

Reprocess Users

5b

Error Message	Title	Organization	First Name	Last Name	PDMP Specialty
NPI should be 10 digits	Scribe	CRISP Test	CRISP Test	Test1	



User Search



1 Locating a User

Search for Users in any account you manage:

(1a) Enter User’s first name, last name, full name or email address in the search bar at the top of the Users tab **Search for Users within the User Audit Page**

(1b) Enter the User’s first or last name in the search bar

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

All Contacts

1a

Search Contact

user account

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

Page 1 of 1

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.
 OTE: All users must be verified once every 90 days to maintain access.

1b

Search

Active User Suspended User

Active Users Approve All



Provisioning Services



1 Assign Services

- (1a) Access the active User using the search bar in the *Users* tab
- (1b) Click on the User's name
- (1c) Select *Service Management*
- (1d) Select *Assign Services*

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

All Contacts

Search Contact

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

Page 1 of 1

< Previous Next >

SP-MD lkdfjsajjkl@lsaksjfdlakjf234.com

Service Management

*Select Service Choices

Assign Services

Deactivate Services

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

Contact
User Account

+ Follow **Service Management**

Account Name	HIE Source	Phone	Email
Junior Smoke Test	CRISP-MD	(111) 111-1111	useraccounts@crispsharedservices.com

DETAILS USER SERVICES



2 Assign Services

- (2a) Assign Service: Select Service you wish to assign
- (2b) Click *Next*
- (2c) Click *Finish*

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

*Select at least one service below:

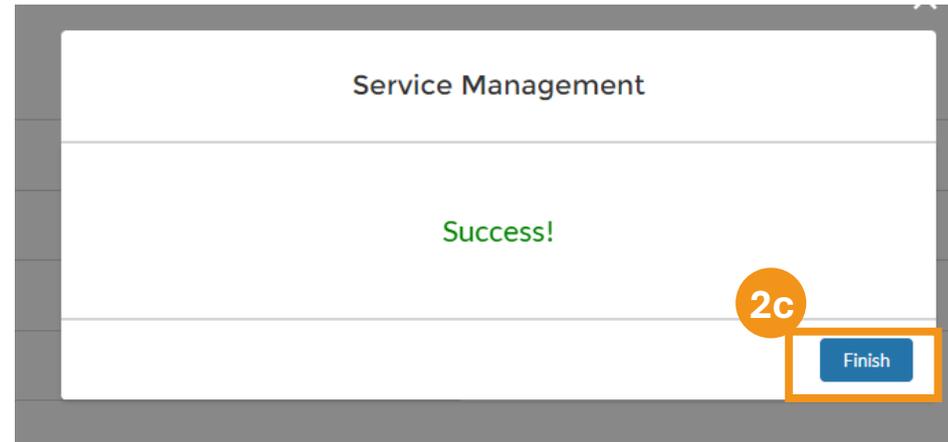
2a

CSS Event Notification Deliver (CEND): Population Explorer
CEND

COVID-19 Lab Tools
COVIDLabTools

2b

Next



2c

Finish



3

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)

(3a) Select the Account associated with the Users who need access to a service

(3b) Select *Services* tab – the Service tab will display all services available for Admins to add to users of this account

HOME ACCOUNTS **USERS** ADD USERS

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

Account
Next Generation LLC

Website Industry
Ambulatory

3b

DETAILS PANELS **SERVICES** ACTIVE USERS SUSPENDED USERS

Account Name
Next Generation LLC

Parent Account

Industry
Ambulatory



4 Select Service

- (4a) Identify service name in the "Service" column
- (4b) Click on the Org Service blue hyperlink (next to the Service) you would like to provision to Users
- (4c) Click *Service Management*
- (4d) Click *Assign Services*

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Account **Next Generation LLC** + Follow

Website Industry
Ambulatory Medical

4a SERVICES PANELS **SERVICES** ACTIVE USERS 4b SUSPENDED USERS

Services	Org Service
CSS Event Notification Delivery (CEND): Population Explorer	Next Generation LLC - CEND
Consent Tool	Next Generation LLC - ConsentTool
Referrals	Next Generation LLC - ReferralUI
Clinical Information	Next Generation LLC - InContext
Snapshot	Next Generation LLC - Snapshot

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Asset **Next Generation LLC - CEND** 4c Service Management

Account [Next Generation LLC](#) Contact Product [CSS Event Notification Delivery \(CEND\): Population Explorer](#) Status Active Install Date 10/9/2024

DETAILS RELATED

Asset Name Next Generation LLC - CEND	Status Active
Account Next Generation LLC	Install Date ⓘ 10/9/2024
Usage End Date	Deactivation Reason

Service Management

*Select Service Choices

4d Assign Services

Deactivate Services



5 Select Service

Select Users:

(5a) Select the User(s) you are granting access this service by checking the box name to their name

(5b) 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.

<
>

5a

		Name	Email
1	<input type="checkbox"/>	Aalnerer1 chestington1	aalnerer1chestingt...
2	<input checked="" type="checkbox"/>	Aalnerer10 chestingto...	aalnerer10chestingt...
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.

5b

Confirm Selections



6 Confirm Selections

Confirm Selections:

(6a) Review and confirm list of users who should access this service

(6b) click *Complete!*

(6c) 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
6b Complete!

Assign Service

Assign Snapshot Service

Select Access
✓
✓
Complete!

Success!

6c Finish



Deactivating Services



1 Deactivating a service for a single User

- (1a) Access the active User using the search bar at the top of the *Users* tab
- (1b) Click on the User's name
- (1c) Click *Service Management*
- (1d) Click *Deactivate Services*

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

All Contacts

1a Search Contact

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

Page 1 of 1

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

Contact **User Account** 1c [+ 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

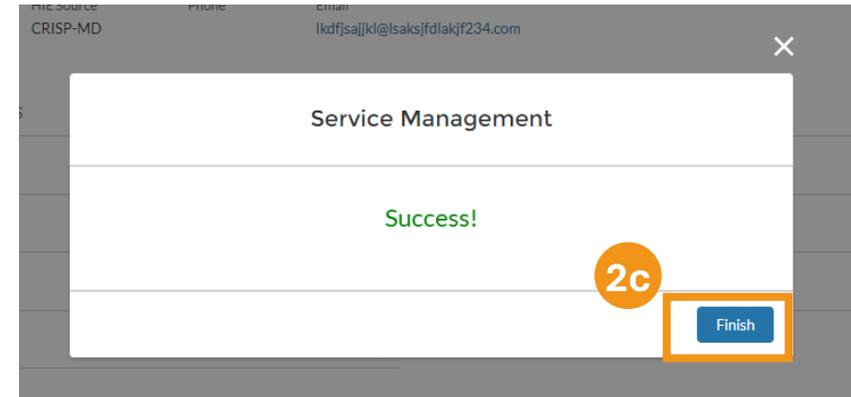
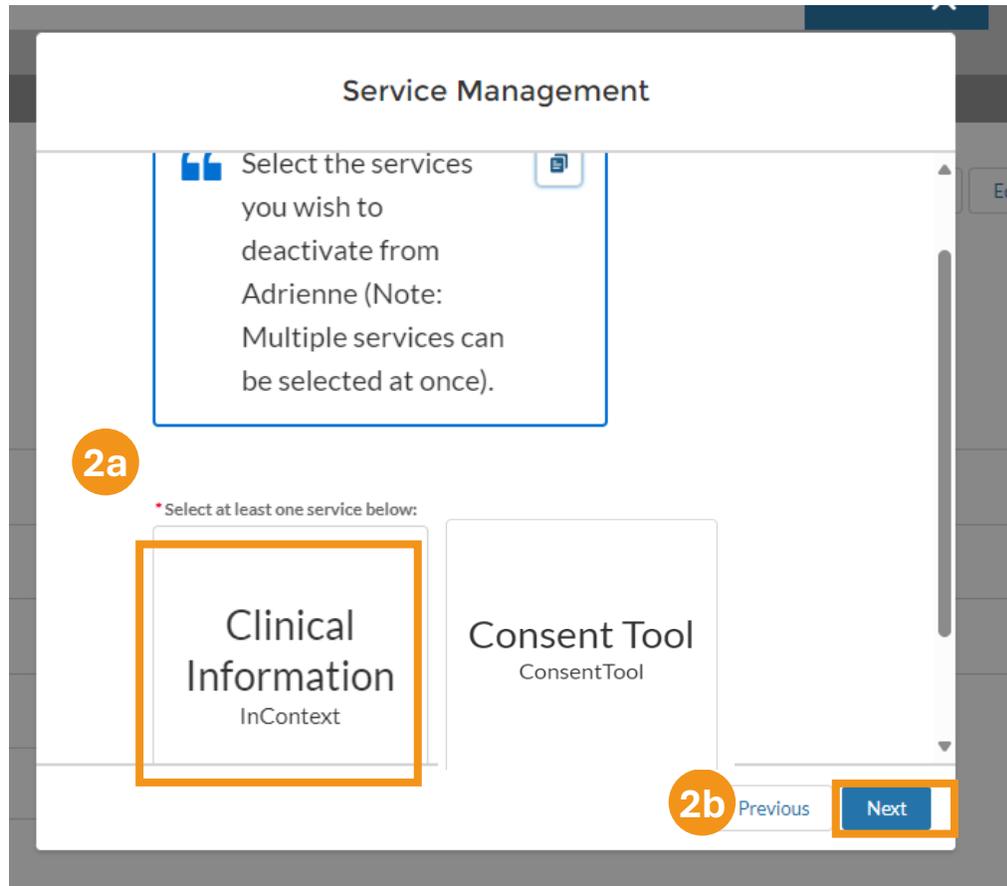
1d [Assign Services](#) [Deactivate Services](#)



2

Deactivating a service for a single User

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



Managing Existing Users for Quarterly Audits



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.

2

Managing Active Users

- (2a) To work with Active Users, ensure the *Active User* tab is selected
- (2b) 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
- (2c) Select Deny to revoke access for individuals who are no longer employees within your organization
- (2d) Select *Complete Audit*, confirm selections on User Confirmation Page then select “*Finish*”

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.

Search

2a

Active User Suspended User

Active Users

2b

Approve Current Page

Status	Name	Email	Member Title	Department	Audit Date	Audit By
<p>2b</p> <p>Approve Deny</p>	HIE AdminEmail	mpartlow@avideon.com				
<p>2c</p> <p>Approve Deny</p>	Juan Gonzalez					

2d

Complete Audit Cancel



3 Managing Suspended Users

- (3a)** To work with suspended users, ensure the *Suspended User* tab is selected
- (3b)** If *Suspended Users* are present, select the appropriate indicator to Approve or Deny the user. If Denied, the user account will be revoked
- (3c)** 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

3a

Suspended Users

Approve Current Page

Status	Name	Email	Member Title	Department	Audit Date	Audit By
3b Approve Deny	Laughter Ajibade	laughter@test.com	Nurse Practitioner		2021-03-16	2021-03-16
Approve Deny	Peter Shay	shay@test.com	Physician, Intern		2021-03-17	2021-03-17
Approve Deny	Test Thu1	testthu1@test.com	Dentist		2021-03-17	2021-03-17
Approve Deny	Nick Redfurn	nick@test.com			2021-03-18	2021-03-18
Approve Deny	test singleuser	test@sunuser.com	Dentist		2021-03-18	2021-03-18

3c

Complete Audit Cancel



4

Confirming an Audit

- (4a) Upon clicking *Finish*, you will see the Success prompt
- (4b) 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@gkjdslafd.com

4a

4b

✓ Success
All records Successfully Updated
✕



Managing Multiple Accounts for Quarterly Audits



HIE Admins must audit all users every 90 days to maintain access.
Failure to complete the audit will result in user access suspension.

1

Log in to the HIE Admin Tool.

2

Select "Audit Users."

3

Select accounts below you would like to audit.

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

All Accounts

Audit Accounts

Search Account

	Account Name	Billing State/Province	Billing City
1	CRISP Internal Users - No Break Glass DC	District of Columbia	
2	CRISP DEMO		
3	Johns Hopkins Health System	Maryland	
4	MD Family Reunification		
5	DC Family Reunification	District of Columbia	
6	CRISP Internal Users - Break Glass	Maryland	
7	CRISP Internal Users - No Break Glass	Maryland	
8	WVHIN Internal Users	West Virginia	
9	CRISP Internal Users - DC Break Glass	District of Columbia	
10	CONNIE Internal		
11	Connie TEST		
12	CONNIE - Assisted Living Test	Connecticut	

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Select Account

Please select accounts below you would like to audit. After you are finished selecting press 'Submit' to confirm your selections.

- Account Name
- CRISP Internal Users - No Break Glass DC
- CRISP DEMO
- Johns Hopkins Health System
- MD Family Reunification
- DC Family Reunification
- CRISP Internal Users - Break Glass
- CRISP Internal Users - No Break Glass
- WVHIN Internal Users



4 Click 'Submit' to confirm your selections.

5 Confirm account selection and click 'Submit.'

Account Name

- CRISP Internal Users - No Break Glass DC
- CRISP DEMO
- Johns Hopkins Health System
- MD Family Reunification
- DC Family Reunification
- CRISP Internal Users - Break Glass
- CRISP Internal Users - No Break Glass
- WVHIN Internal Users
- CRISP Internal Users - DC Break Glass
- CONNIE Internal
- Connie TEST
- CONNIE - AssetProdTrigTest
- CONNIE Demo
- Virginia Health Information (VHI)
- SCEHA Internal
- RICC Internal
- Cardiovascular Institute of New England

Submit

Account Selection Confirmation

Account Name

Johns Hopkins Health System

MD Family Reunification

I confirm I've selected these accounts/users to audit

[Back](#) **Submit**



6 Approve or deny users under those selected accounts.

HIE Admin - User Audit Page

Audit Accounts:

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.

Search

Active Users | Suspended Users

Active Users Approve Current Page

Status	First Name	Last Name	Email	Account N...	Member Ti...	Department	Audit Date	Audit By
Approve Deny								
Approve Deny								



7 Click 'Submit' to confirm your selections.

8 Confirm account selection and click 'Submit.'

All Accounts

Audit Accounts

Search Account

	Account Name	Billing State/Province	Billing City
1	CRISP Internal Users - No Break Glass DC	District of Columbia	
2	CRISP DEMO		

Account **CRISP DEMO** + Follow User Export User Audit

Phone Website Industry
Ambulatory Medical

DETAILS PANELS SERVICES ACTIVE USERS SUSPENDED USERS

Account Name CRISP DEMO Phone
Parent Account Website



Bulk Export User List



1 Choosing a User

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

The screenshot displays the 'Accounts' section of the HIE Admin User Guide. The navigation bar includes 'HOME', 'ACCOUNTS', 'USERS', 'ADD USERS', and 'USER GUIDE & HELP'. The 'Accounts' section is titled 'Recently Viewed' and shows a list of two accounts: 'Jones Practice LLC' and 'Partlow Medical'. The 'Jones Practice LLC' account is highlighted, and a callout '1a' points to its name. Below the list, the details for 'Interstellar LLC' are shown, including its website and industry. A toolbar at the bottom right of the account details includes '+ Follow', 'User Export', 'New Note', and 'Audit'. A callout '2' points to the 'User Export' button. The bottom navigation bar includes 'DETAILS', 'ACTIVE USERS', 'SUSPENDED USERS', 'PANELS', and 'SERVICES'. The 'Account Name' and 'Account Owner' fields are visible at the bottom.

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

Account: Interstellar LLC
Website: Ambulatory Medical
Industry: Ambulatory Medical

Account Name: Account Owner



(3) 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 or SES Direct 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 a SES Direct user, in which case we do not currently share the last login date.

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
1	Suspended	Interstellar LLC	Green9	Grapes9	jennifer.jones@crispealth.org			Scribe	2/2/2023	9/26/2023 12:00
2	Suspended	Interstellar LLC	dog2	gosh2	dog2gosh2@lkajdfakj2342.com			Scribe	3/2/2023	
3	Active	Interstellar LLC	dog3	gosh3	dog3gosh3@lkajdfakj2342.com			Pharmacist	3/2/2023	9/18/2023 12:00
4	Suspended	Interstellar LLC	dog5	gosh5	dog5gosh5@lkajdfakj2342.com			Scribe	3/2/2023	9/27/2023 12:00
5	Suspended	Interstellar LLC	dog16	gosh16	dog16gosh16@lkajdfakj2342.com			Scribe	1/23/2023	
6	Suspended	Interstellar LLC	dog17	gosh17	dog17gosh17@lkajdfakj2342.com			Scribe	1/23/2023	
7	Suspended	Interstellar LLC	dog21	gosh21	dog21gosh21@lkajdfakj2342.com			Scribe	1/23/2023	
8	Suspended	Interstellar LLC	dog22	gosh22	dog22gosh22@lkajdfakj2342.com			Scribe	1/23/2023	
9	Suspended	Interstellar LLC	dog23	gosh23	dog23gosh23@lkajdfakj2342.com			Scribe	1/23/2023	
10	Suspended	Interstellar LLC	dog24	gosh24	dog24gosh24@lkajdfakj2342.com			Scribe	1/18/2023	
11	Suspended	Interstellar LLC	dog25	gosh25	dog25gosh25@lkajdfakj2342.com			Scribe	1/24/2023	
12	Suspended	Interstellar LLC	dog28	gosh28	dog28gosh28@lkajdfakj2342.com			Scribe	2/1/2023	
13	Suspended	Interstellar LLC	dog29	gosh29	dog29gosh29@lkajdfakj2342.com			Scribe	2/2/2023	
14	Suspended	Interstellar LLC	dog41	gosh41	dog41gosh41@lkajdfakj2342.com			Physician	1/18/2023	
15	Active	Interstellar LLC	dog43	gosh43	dog43gosh43@lkajdfakj2342.com			Physician	9/8/2023	
16	Suspended	Interstellar LLC	dog50	gosh50	dogdogshedit1251@gmail.com	8977890789		Physician, Resident	2/2/2023	
17	Active	Interstellar LLC	dog67	gosh67	dog67gosh67@lkajdfakj2342.com			OCME Investigator	9/8/2023	NA
18	Suspended	Interstellar LLC	dog100	gosh100	dog100gosh100@lkajdfakj2342.com			Physician	1/25/2023	
19	Suspended	Interstellar LLC	Napoleon7	Dynamite7	napoleon7dynamite7@ldajfka93289284.com			Medical Assistant	2/2/2023	
20	Suspended	Interstellar LLC	Napoleon9	Dynamite9	napoleon9dynamite9@ldajfka93289284.com			Nursing Home Administrator	2/2/2023	
21	Suspended	Interstellar LLC	Napoleon10	Dynamite10	napoleon10dynamite10@ldajfka93289284.com			Nursing Home Other Staff	2/2/2023	
22	Suspended	Interstellar LLC	Napoleon12	Dynamite12	napoleon12dynamite12@ldajfka93289284.com			Other Non-Licensed Staff	2/2/2023	
23	Suspended	Interstellar LLC	Napoleon16	Dynamite16	napoleon16dynamite16@ldajfka93289284.com			Pharmacy Technician	2/2/2023	
24	Suspended	Interstellar LLC	Napoleon22	Dynamite22	napoleon22dynamite22@ldajfka93289284.com			Public Health Personnel	2/2/2023	
25	Suspended	Interstellar LLC	Napoleon24	Dynamite24	napoleon24dynamite24@ldajfka93289284.com			Registered Nurse	2/2/2023	
26	Suspended	Interstellar LLC	Napoleon2	Dynamite2	napoleon2dynamite2@ldajfka93289284.com			Certified Nurse Midwife	2/2/2023	
27	Suspended	Interstellar LLC	Napoleon19	Dynamite19	napoleon19dynamite19@ldajfka93289284.com					



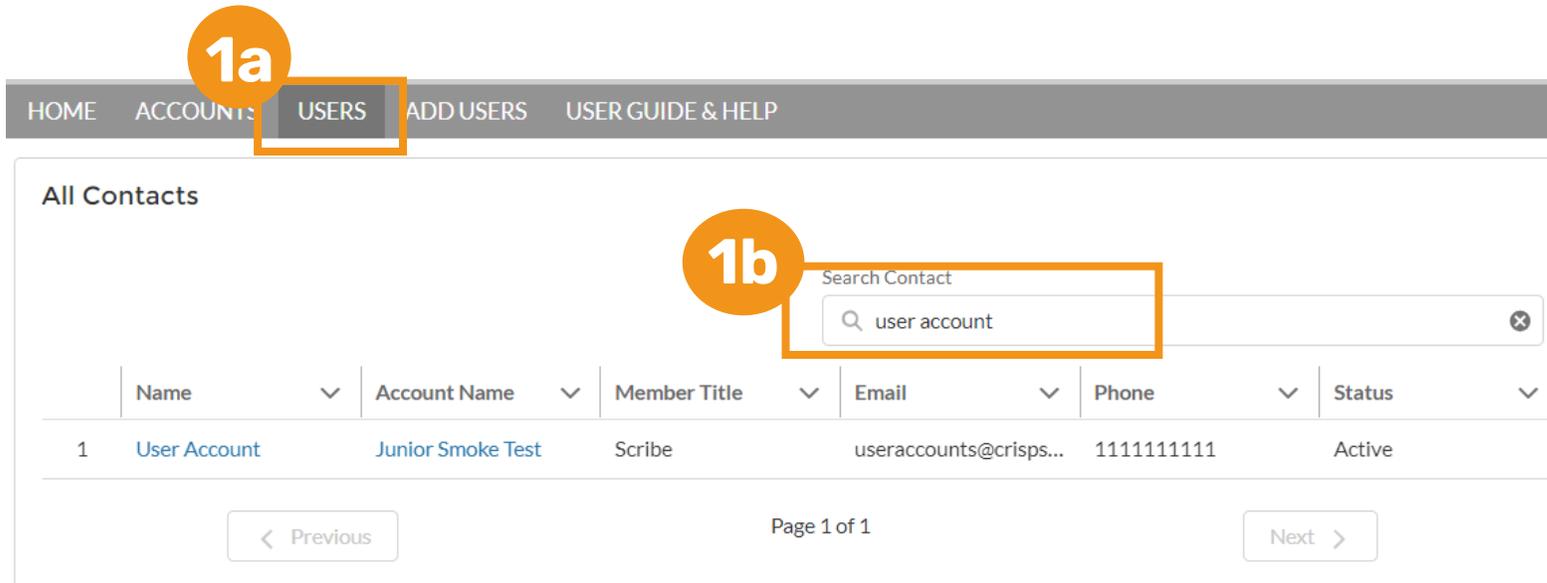
Editing User Details



1 Choosing a User

(1a) Go to Users tab

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



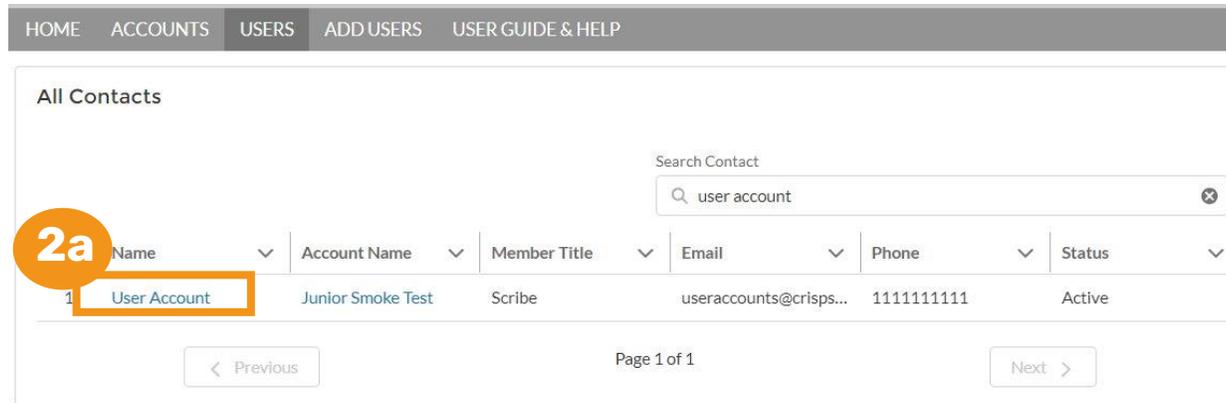
The screenshot shows the 'All Contacts' page in the HIE Admin system. The 'USERS' tab is highlighted in the top navigation bar, with an orange circle and '1a' next to it. Below the navigation bar, there is a search bar labeled 'Search Contact' with the text 'user account' entered. An orange circle and '1b' are next to the search bar. Below the search bar is a table with columns: Name, Account Name, Member Title, Email, Phone, and Status. The table contains one row with the following data: 1, User Account, Junior Smoke Test, Scribe, useraccounts@crisps..., 1111111111, Active. At the bottom of the page, there are navigation buttons: '< Previous', 'Page 1 of 1', and 'Next >'.

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



2 Viewing and Selecting a Contact

(2a) Choose the Contact (User) you would like to view by clicking on the Contact Name



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



3

Editing and Saving a Contact

(3a) Select *Edit* to update the contact’s information

(3b) Select *Save* to confirm the updated information

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.

HOME ACCOUNTS USERS ADD USERS
Edit Contact

Contact **Ronald Test**

Title	Account Name	Phone (2) ▼	Email	Contact Owner
	Jones Practice LLC			Avideon CRISP

+ Follow
3a Edit
Assign Services

*Name

Salutation

First Name

Middle Name

*Last Name

Suffix

Account Name Email

Member Title Phone

Department Picklist Mobile

User Status

DETAILS RELATED

Name	Contact Owner
Ronald Test	Avideon CRISP
Account Name	Contact Type
Jones Practice LLC	

3b

Cancel Save & New Save



Password/ Activation Email Reset



1 User Password or Activation Email Reset

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

- (1a) Search for User in Users tab
- (1b) Click on User's name
- (1c) Click on *User Services* tab
- (1d) Click View All to expand view

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

All Contacts

1a Search Contact

1b

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

Page 1 of 1

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

1c

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	

1d View All



2 User Password or Activation Email Reset

(2a) 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 Informati	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



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 has already activated their account
- (3c)** Read the instructions then click on *Confirm Reset*

Asset
Plum10 Fruit10 - Next Generation LLC - Portal

Account	Contact	Product	Status	Install Date
Next Generation LLC	Plum10 Fruit10	HIE Portal	Active	6/22/2022

DETAILS

Asset Name
[Plum10 Fruit10 - Next Generation LLC - Portal](#)

Account
[Next Generation LLC](#)

Product
[HIE Portal](#)

3a

HIE Portal User Management

3b

HIE Portal User Management

Reset Password

Resend Activation Link

Cancel

3c

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



Expectations for KHIE Admins...



IN PARTNERSHIP WITH



- KHIE Admins Attend at least 1 Training per Session Type by **March 1st** to Move on to the Next Phase.
 - Intro to the KHIE Admin Tool
 - KHIE Portal: Clinical Information, Event Notification (CEND), Panel Processor & Population Explorer
 - Consent Tool Overview for 42 CFR Part 2 Participants
 - If Applicable
- Maintain the “Train the Trainer” Teaching Approach
 - KHIE Admins will Continue to Train their Users on KHIE Services
 - To assist KHIE Admins with the training process, KHIE will open trainings to **All** current users in March.
 - Training Videos will also be available on our KHIE Website in March.
- Consider appointing an Additional KHIE Admin to Assist with Managing Users

Additional KHIE Portal Training Opportunities

Intro to the KHIE Admin Tool Training

Weekly on Monday

- 8:30 – 9:30 AM
- 10:30 - 11:30 AM
- 12:30 - 1:30 PM
- 2:30 - 3:30 PM
- 4:00 – 5:00 PM

All Training Links have been Sent to KHIE Admins for the Month of February.

Trainings will Open up to all Users in March.

KHIE Portal Training: Clinical Information, Event Notification, Panel Processor & Population Explorer

Weekly on Wednesday

- 8:30 - 10:00 AM
- 11:00 - 12:30 PM
- 1:30 - 3:00 PM
- 3:30 - 5:00 PM

Weekly on Thursday

- 8:30 - 10:00 AM
- 11:00 - 12:30 PM
- 1:30 - 3:00 PM
- 3:30 - 5:00 PM

Consent Tool Overview for 42 CFR Part 2 Participants

Weekly on Friday

- 8:30 - 9:30 AM
- 10:00 - 11:00 AM

KHIE Office Hours

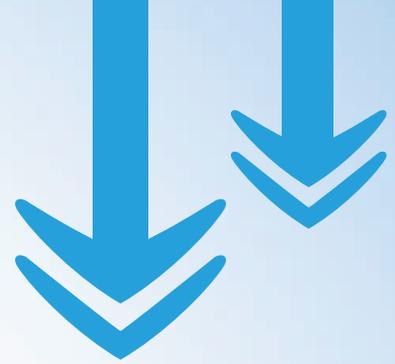
Weekly on Friday

Join anytime between 12:00 PM – 5:00 PM and our KHIE Team will answer any questions you may have regarding any of our services.

- 12:00 PM - 5:00 PM



Questions?



IN PARTNERSHIP WITH



Visit our website: www.khie.ky.gov

Email us: khie@ky.gov



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