

HIE Portal Guide

SEPTEMBER 2025



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1 Overview



- » The HIE Portal was developed to provide a superior user experience while leveraging HIE applications. Users with access to clinical data can search for patients directly from the home page and instantly open their records in various applications without interruption. All users' Portal accounts are protected by secure application or token based two factor authentication.

1.1 What is Image Exchange?

- » **The HIE Portal receives data from participating healthcare organizations dependent on state legislation. Data Types Include:**
- Admit, discharge, or transfer (ADTs) information, which can include patient demographic, diagnostic, and insurance information,
 - Patient-specific clinical summary documents, called Continuity of Care Documents (CCDs),
 - Radiology images and reports,
 - Laboratory results,
 - List of an organization's patients, and
 - Other clinical that include discharge summaries, care notes, and care alerts.

1.2 Accessing the Portal

- » **To access the Portal, users must:**



Navigate to the Portal URL - <https://portal.crisphealth.org>



Log into the Portal with their username, password, and two-factor authentication credentials.



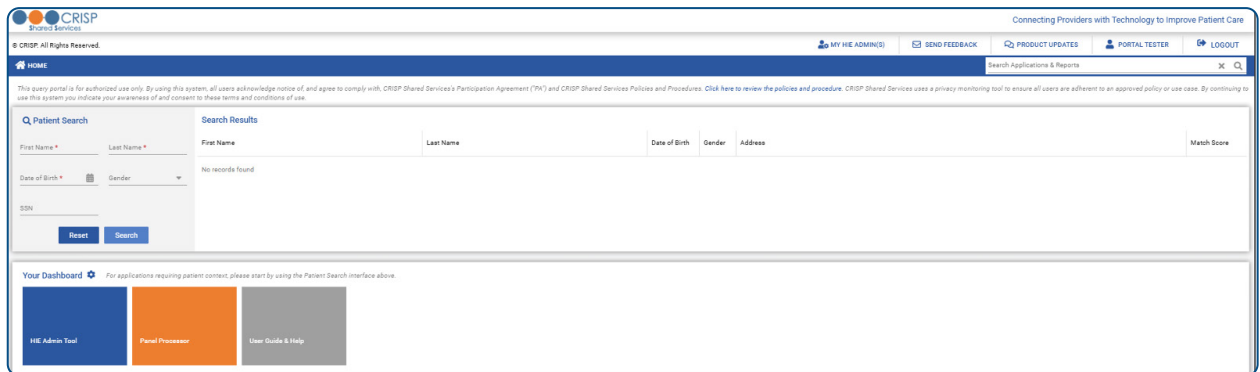
For authentication, view Authentication section of Appendix.

2 Portal Home Screen



» The Portal home screen has three main sections:

- **Toolbar (top):** Includes application search, home, logout, and other tools.
- **Patient Search (middle):** Look up patients. Detailed instructions are in the Patient Search section of this guide.
- **Your Dashboard (bottom):** Displays all applications you can access. More details are in the Launching Applications section.



2.1 Accessing the Portal

» The tool bar of the Portal contains the following features:

- **Home Button:** Users can click the Home Button to navigate back to the Portal Home Screen from an application page.
- **HIE Admin:** Users can hover to view the name & email address of their organization's HIE Admin.
- **Logout Button:** Users can click the Logout Button to sign out of the Portal. Once clicked, the page will navigate back to the login screen.
- **Send Feedback Button:** Opens a feedback forum in another tab which can be used to send secure feedback or questions to Technical User Support. Users are required to fill out the following fields before submitting their feedback. A support ticket will be created the support team to work on and reply to the requesting user.

2 Portal Home Screen



Submit Feedback / Request Support ✕

Your feedback is important to us: we use it to improve our services. This form can be used to request support or submit feedback on CRISP services. **Please do not submit Protected Health Information (PHI) via this form.**

If you need immediate assistance or need to discuss PHI in the course of resolution, please call us at 877-952-7477. Support hours are Monday through Friday, 8am to 5pm Eastern Standard Time.

Last Name *
Tester

Telephone

First Name *
Portal

Email (required) *
portaltester@crisphealth.org

If you are inquiring about a specific service, please select from the list

Clinical Information

- Consent Tool
- HIE Admin Tool
- Panel Processor

I'm not a robot

Cancel & Discard
Submit

- **Product Updates:** Opens a pop out window which will display news and notes about CRISP services. Typically, new features or releases of applications will be listed here. A notification icon will appear over the Product Updates button when new content has been published to this feature.

HIE
Search Applications & Reports

Scheduled Maintenance Published On: 08-18-2025 ✕

The Clinical Information application will be undergoing scheduled maintenance. Users can expect brief interruptions to application functionality.

This query portal is for authorized use only. By using this system, all users acknowledge notice of, and agree to comply with, CRISP Shared Services's Participation Agreement (PA) and CRISP Shared Services Policies and Procedures. Click here to review the policies and procedure. CRISP Shared Services uses a privacy monitoring tool to ensure all users are adherent to an approved policy on use case. By continuing to use the system you indicate your awareness of and consent to these terms and conditions of use.

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 consent please start by using the Patient Search interface above.

HIE Admin Tool

Panel Processor

User Guide & Help

2 Portal Home Screen

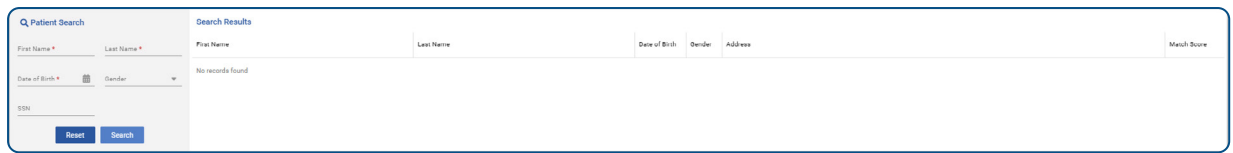


- **Application Search Bar:** User can use this free text field to search for applications within the Portal by name. Please note that if the application requires a patient first before launching it will not appear in the search results until a patient search is made.



2.2 Patient Search

» Users can search for patients directly from the Portal home screen.



- Users must enter a first name, last name, and date of birth to render search results.
- Gender and Social Security Number fields can be added to narrow the selection.
- Data entered is not case-sensitive, and dates do not need forward slashes separating the month data and year. Entering 050281 will result in 05/02/1981
- The results of the Patient Search will appear in order of most likely to least likely matches. Each result will contain a match score and match grade. Only patients matched using the required fields plus gender and social security number (SSN) will display as 'Certain'. The possible grades include:

1. Certain ●
2. Probable ●
3. Possible ●

First Name	Last Name	Date of Birth	Gender	Address	Match Score
GILBERT	GRAPPE	01/01/1984	Male	4145 East C Adkins Dr Birch River, WV 26610	117 - probable
GILBERT	GRAPPE	01/01/1984	Female	1620 Eye Street, NW, Washington, DC, 20006	117 - probable
GILBERT	GRAPPE	01/01/1984	Female	123 AUDACIOUS LANE, BALTIMORE, MD 21245	117 - probable
GILBERT	GRAPPE	01/01/1984	Male	123 Fake Road, FakeTown, FakeState, 12345	117 - probable
GILBERT	GRAPPE	01/01/1984	Female	28 Artisan Park, Birmingham, Alabama, 28889	117 - probable



2.3 Launching Application

» Within the Portal, some applications require a patient search, while others do not.

- Applications that do not require patient context appear directly in Your Dashboard.
- Users can launch these applications by clicking on the blue box or tile.

The screenshot shows the CRISP Shared Services Portal Home Screen. At the top, there is a navigation bar with the CRISP logo, the tagline "Connecting Providers with Technology to Improve Patient Care", and user options like "MY HIE ADMIN(S)", "SEND FEEDBACK", "PRODUCT UPDATES", "PORTAL TESTER", and "LOGOUT". Below the navigation bar is a search bar for "Search Applications & Reports".

The main content area is divided into two sections. On the left is the "Q Patient Search" interface, which includes fields for "First Name" (Gilbert), "Last Name" (Grape), "Date of Birth" (01/01/1984), and "SSN". There are "Reset" and "Search" buttons. On the right is the "Search Results" table, which contains the following data:

First Name	Last Name	Date of Birth	Gender	Address	Match Score
GILBERT	GRAPE	01/01/1984	Male	4145 East C Adkins Dr, Birch River, WV, 26610	117 - probable
Gilbert	Grape	01/01/1984	Female	1620 Eye Street, NW, Washington, DC, 20006	117 - probable
GILBERT	GRAPE	01/01/1984	Female	123 AUDACIOUS LANE, BALTIMORE, MD, 21245	117 - probable
Gilbert	Grape	01/01/1984	Male	123 Fake Road, Fakestown, Fakestate, 12345	117 - probable
Gilbert	Grape	01/01/1984	Female	28 Artisan Park, Birmingham, Alabama, 26849	117 - probable

Below the search results is the "Your Dashboard" section, which contains five application tiles: "Clinical Information", "Consent Tool", "HIE Admin Tool", "Panel Processor", and "User Guide & Help".

Applications that require patient context will only appear in Your Dashboard after a patient search.

- After completing a patient search, users can access patient data in an application by:
 - Clicking on the patient record in the search results table.
 - A Selection App pop-up will appear.
 - Click the four-box icon next to the application name to launch it.

This screenshot is similar to the previous one, but it shows a "Select App" pop-up window overlaid on the search results table. The pop-up has a title bar "Select App" and a close button. It contains a list of application tiles: "Clinical Information", "Consent Tool", and "HIE Admin Tool". The "Clinical Information" tile is selected, and a blue box highlights it. The search results table and dashboard are visible in the background, showing the same data as the previous screenshot.

2 Portal Home Screen



- Once a patient search is completed and a patient record as been selected, applications that require a patient search will now appear within Your Dashboard. Users can launch these by clicking on the desired application's blue box or tile.

Patient Search		Search Results					
First Name *	Last Name *	First Name	Last Name	Date of Birth	Gender	Address	Match Score
Gilbert	Grape	GILBERT	GRAPE	01/01/1984	Male	4145 Earl C Adkins Dr, Birch River, WV 26610	117 - probably
01/01/1984		Gilbert	Grape	01/01/1984	Female	1620 Eye Street, NW, Washington, DC 20004	117 - probably
		GILBERT	GRAPE	01/01/1984	Female	123 AUDACIOUS LANE, BALTIMORE, MD, 21245	117 - probably
		Gilbert	Grape	01/01/1984	Male	123 Fake Road, Palmetto, Palmetto, 12345	117 - probably
		Gilbert	Grape	01/01/1984	Female	28 Artisan Park, Birmingham, Alabama, 24849	117 - probably

- All applications will display within the iframe of the Portal as shown below. Users can navigate to another application by clicking the application title in the side tool bar. User can collapse the application side menu by clicking on the arrow next to Reports & Applications. The Home button at the top will navigate the page back to the Portal home screen.

HIE InContext
GILBERT GRAPE
 Male | Jan 1, 1984

Demographics

Name: GILBERT GRAPE
 Date of Birth: Jan 1, 1984
 Gender: Male
 Address: 4145 Earl C Adkins Dr, Birch River, WV 26610
 Email: Sanders@KennedyKrieger.Org

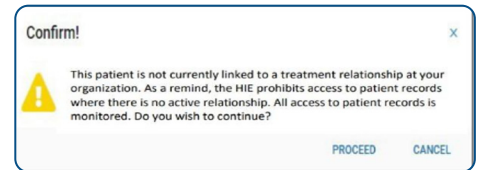
Next of Kin

- DAD GRAPE**
 FI: (443)991-3081
- JULIE GRAPE**
 FI: 410-555-5455
- STELLA GRAPE**
 W: (555)555-5555
- NO CONTACT**
 OTHER
- 99RESTA**
- JULIETTE LEWIS**
 SO: (012)845-4789



2.4 Patient Attestation

» Users who attempt to launch an application for a patient whom they do not have an active treatment relationship for, (i.e. are not currently active on their organization's Encounter Notification Service (ENS) Panel) will be presented with the following warning message.



The user can choose to select Cancel, which will navigate the page back to the home screen. If the user selects Proceed, they will be asked to enter a reason for attesting to the relationship. Also, please be aware that all these requests are recorded and audited.

If the patient for whom you are attempting to launch an application has opted out of the Portal, the following message:

This patient has opted-out from having their data shared through the HIE. Only information required by law is available to treating providers. The patient may learn about their rights and opt back in

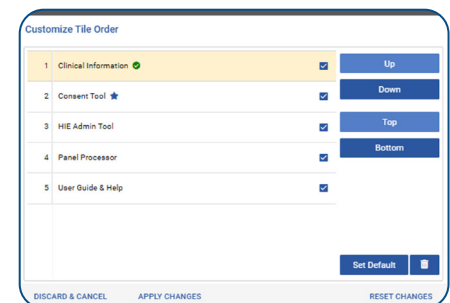
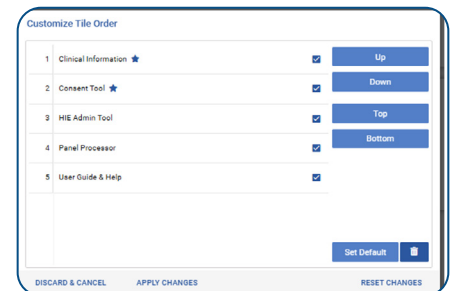
2.5 Tile Customization

» Applications in a user's dashboard (or in the select application menu after a patient search) will display in random order by name, with one exception:

- The Clinical Information service, if available, always appears first after a patient search.

Users can customize the order of their application tiles:

- Click the Wrench Icon next to Your Dashboard.
- A Customize Report Categories pop-up will appear.
- Select an application title, then use the tool buttons to adjust the order:
 - **Up/Down** = move by one position
 - **Top/Bottom** = move to the first or last position



3 Appendix



» Portal Account Set Up

A HIE Admin at your organization must request or permission user access via a credentialing tool. If you are unsure if your organization has a participation agreement or you do not know who your HIE Admin is contact Technical User Support.

Users will receive an email with an activation link once their account is created. The email will arrive from 'donotreply@hmetrix.com' with the subject line Portal Activation. After the password is set up, it is time to register two factor authentication (2FA).

» Two Factor Authentication

To improve security, the Portal requires that all users set up two-factor authentication for their portal account. Users have three options to meet the two-factor authentication requirement of the Portal.

Please note: Each two factor authentication must be unique to each user. Shared authentication between the same phone number is not allowed.

- Twilio Authy Application – the preferred method
- Other Authentication Applications – such as Google Authenticator, Microsoft Authenticator, Duo Security Key such as a YubiKey

» Authy & Other Authenticator Applications

1. Users will be presented with a prompt to register for Two-Factor Authentication as shown in the figure below after they set up their password.



2. Select 'Authy Push or Token' as the 2FA method from the dropdown list. The alternative of a security key (FIDO2) requires a hardware key. The security key option is discussed later in this guide.
3. Users must enter their cellular phone number and click the Register button. When the user clicks the Register button, the Portal will validate that the phone number entered is a cellular phone number. If it is not a cellular phone number, a message will display, and the user will be prompted to enter another cellular phone number. Users can click the "Ok" button and reenter the phone number.
4. After the phone number has been validated, the Proceed to Activation screen shown in the below figure will be displayed. On clicking Proceed, an Authy account will be created with the given phone number, and the user will be taken to a screen to 'Activate 2FA'. If the user clicks the 'Cancel' button a message will be displayed and will be returned to the 2FA Activation screen.
5. Authy will send an SMS text message like the one shown to the right. Authy will autodetect the device type and redirect the user to the appropriate app store to download link. Clicking the link within the text message will prompt the user to download the Authy application onto your registered device.
6. Use of Authy app is strongly preferred.

Users can also use an alternative authenticator app, such as Google Authenticator or Microsoft Authenticator. The alternative authenticator app can be used by scanning the QR code in below figure. Please follow the instructions from the alternative authenticator app to scan the QR code.

To activate 2FA, users need to enter a 6-digit token in the Activate 2FA screen from Authy or their alternative application of choice. This 6-digit token is available on the newly added Portal tab in the Authy app or the alternative authenticator app. Users need to enter the 6-digit token in the textbox and click the Activate button.

If the token is valid users will be granted access to the Portal. Otherwise, users need to reenter a valid token. If the user refreshes or closes the browser tab before activation is complete, the process must start over from the Registration screen.

4 Security Key (FIDO2)



» The security key method of two-factor authentication is the most secure. It requires a hardware or software key that conforms to the FIDO2 standard. Examples are YubiKey, Google Titan, and Feitian ePass FIDO2 security keys. The instructions below assume possession of such a key and have configured a pin on the key.

Please note that a security key cannot be copied or duplicated. Backups of the key are not possible. The key is unique and cannot be substituted with another key.

1. Select 2FA method as 'Security Key (FIDO2)' from the dropdown list.
2. Insert the security key into the USB port and click the register button to register the key with the Portal.
3. Users will be presented with a security screen like the one below. Users need to enter the pin and click OK to continue. Please note that the screen depends on the operating system in use.
4. Users will be prompted to touch the security key's button or biometric scanner. Once touched, the key will be registered against the user's Portal account and the screen will be redirected to the Portal. If the user refreshes or closes the browser tab before activation is complete, the process must start over from the Registration screen.

» Reset Phone Number or Security Key

If your phone number has not changed, you can reset your own two-factor authentication directly through the Portal. If your phone number has changed, contact your HIE Administrator to request a reset tied to your new number.

» Do you have a new Phone Number?

If yes: Please contact your listed HIE Administrator who will need to submit a request to have your phone number reset. What is required from HIE Admin:

- Name of Organization
- Your Name and email Address
- Your old phone number
- Your new phone number
- Your Last Log in Date
- HIE Admin name and email address



If no, please follow to reset your 2FA Authy method.

- New Device and Same Phone Number
- Access to old Device: If you get a new device, but keep your same phone number, AND have another Authy installation already configured for this number, you may be able to regain access without requesting an account recovery. If the Multi-Device option is enabled, you can just enter your old phone number to regain access. You'll only need to confirm access to your account on the already configured Authy device.
- **No Access to Old Device:**
 - Needs account recovery. This feature is also located on the Help Tab within the Authy App. Submit for recovery:
 - From New Mobile Device: Once application is downloaded, within the application, if you hit the settings icon, there is a help center application called "New More help" that allows users to submit a ticket to recover account.



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