

HIE Admin Tool

HIE Administrator Guide

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Applies to: KHIE HIE Portal – HIE Admin Tool



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1 Purpose and Scope



» The HIE Admin Tool enables authorized HIE Administrators to manage their organization's HIE user accounts and service access, including creating users, auditing access every 90 days, and provisioning or deactivating services. This guide is written for HIE Administrators and assumes you already have HIE Portal access. If you need support at any time, please contact Technical User Support at (insert email) or by phone at 866-554-7255.

2 Admin Responsibilities (At a Glance)



What HIE Admins are responsible for

» What HIE Admins are responsible for

- Add new users for your organization's HIE account(s).
- Audit users at least every 90 days to maintain access and prevent suspension.
- Provision (assign) HIE services to users and remove services when no longer needed.
- Deactivate user accounts for staff who leave your organization or no longer require access.
- Support password resets and activation link resends as needed.

Common workflows

- » • **Quarterly:** Complete the 90-day user audit for every account you manage.
- **Onboarding:** Create users (single or bulk) then assign required services.
- **Offboarding:** Deny access during audit and/or deactivate services and accounts.
- **Support:** Search users, update allowable fields, reset portal password/activation.

3 Key Terms and Definitions



» Use these definitions to standardize language when training staff and documenting processes.

Terms



Health Information Exchange (HIE): An integrated network connecting hospitals, primary care practices, and public health entities to securely share patient information.



HIE Administrator: An authorized organizational representative who can credential and remove contacts from their organization.



Account: A legal physical entity. Some HIE Administrators have access to multiple accounts within their larger organization.



Audit: The process of verifying (approving) or denying user access at least every 90 days.



Active User: A user whose access to HIE tools is active.



Suspended User: A user whose access has lapsed due to inactivity, inappropriate use, missing 90-day audit, or employment changes.



Encounter Notification: Alerts that support continuity of care by notifying an organization about a patient encounter elsewhere (triggered by ADT, EMS, VSA/death data, etc.).



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.



Prescription Drug Monitoring Program (PDMP): Access to this service can be obtained by calling HIE Technical User Support Team at 866-554-7255

4 Accessing the Tool

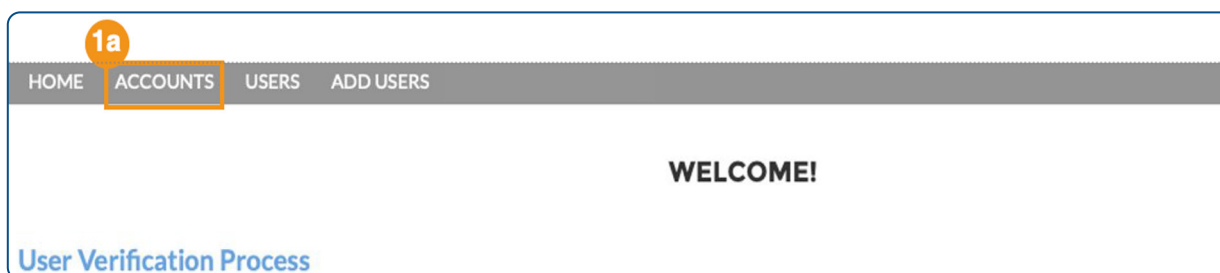


First-time HIE Admin access

» 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.

1a. Logging in from HIE Portal

1. Log into your HIE Portal account.
2. On the landing page, select the “HIE Admin Tool” tile.
3. Navigate to the Accounts tab to begin managing users and services.



5 Auditing Users (Required Every 90 Days)



» HIE Administrators must audit all users at least every 90 days to maintain access. Failure to complete the audit can result in user access suspension.



Auditing multiple accounts

- » 1. Log in to the HIE Admin Tool.
2. Select “Audit Users.”
3. Select the account(s) you would like to audit.

The screenshot shows the 'All Accounts' page in the HIE Admin Tool. The left sidebar has a yellow box around the 'Audit Accounts' link. The main content area displays a table of accounts:

	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	WHIN Internal Users	West Virginia	
9	CRISP Internal Users - DC Break Glass	District of Columbia	
10	CONNIE Internal		
11	Connie TEST		

4. Click ‘Submit’ to confirm your selections.
5. Confirm account selection and click ‘Submit.’

The screenshot shows the 'Account Selection Confirmation' page. On the left, there is a list of accounts with checkboxes. The right side shows a confirmation dialog with a dropdown for 'Account Name' and a 'Submit' button.

5 Auditing Users (Required Every 90 Days)



6. Review users for each selected account and choose Approve or Deny as appropriate.

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. 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

Managing Active Users

» Every 90 days, HIE Administrators must verify each HIE user within their organization. To ensure your patients and their health information are protected, please use this platform to determine whether or not members of your organization should maintain access to HIE resources. Please note, if an HIE user is not verified within the 90-day period, their access to HIE tools will be suspended.

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Auditing Users (Required Every 90 Days)



- » (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

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

2d Complete Audit Cancel

2b Approve Current Page

Managing Suspended Users

- » Suspended users appear when access has lapsed (for example, due to missing audits or inactivity). If a suspended user is approved, remind them to reset their password if they cannot log in.
- (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.**

5 Auditing Users (Required Every 90 Days)



Active User Suspended User **3a**

Suspended Users Approve All

Status	Name	Email	Member Title	Department	Audit Date	Audit By
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 Next Cancel

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@gkjdsldfd.com

Previous **Finish** **4a**

4b

✓ **Success**
All records Successfully Updated ✕

6 Creating Individual Users



» What HIE Admins are responsible for

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

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”

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Creating Individual Users



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.

The screenshot displays the 'ADD USERS' interface. On the left, a form titled 'Single User' contains fields for 'Title' (with a dropdown set to 'Other Licensed Healthcare Practitioner'), 'Organization' (dropdown set to '--None--'), 'User Type' (dropdown set to '--None--'), 'First Name', 'Last Name', 'Email', 'Department' (dropdown set to '--None--'), 'State License' (dropdown set to '--None--'), and 'Phone'. A 'Submit' button is at the bottom of this form, labeled with callout 3a. To the right, a 'Confirm' modal is open, showing two checked checkboxes for attestation. A 'Confirm' button in this modal is labeled with callout 3b. At the bottom of the screen, a green success message box states 'Success New User created successfully!' with a close button (X), labeled with callout 3c.

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

(4b) 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**

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Creating Individual Users



The screenshot displays a 'Confirm' dialog box with two sections. The first section, labeled '4a', contains two checkboxes with accompanying text. The second section, labeled '4b', shows a red error message box that reads 'Error Contact Exist with the given email at Different account' with a 'SEARCH' button next to it.

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 prohibition against sharing login credentials with another individual.

4a

4b

Error
Contact Exist with the given email at Different account

SEARCH

Confirm Cancel

7

Creating Multiple Users (bulk upload)

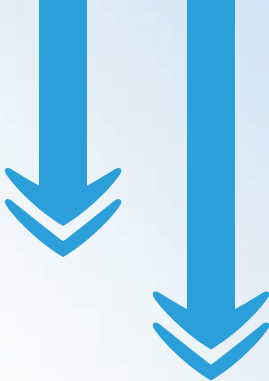


» Preparing the Bulk Upload Form

(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



**HEALTHCARE'S BETTER
WHEN IT'S CONNECTED.
CONNECT WITH KHIE TODAY.**

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