

Kentucky Health Information Exchange (KHIE)

KHIE ePartnerViewer Admin User Provisioning & Access Management

Quick Reference Guide

June 2023

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Revision History

Version No.	Date	Summary of Change
1.0	September 2019	Initial Version
2.0	February 2020	Changed language for Clinical role provisioning.
3.0	May 2023/June 2023	Designed guide to be used for KHIE ePartnerViewer Admins. Removed KOG instructions to shorten the version to only include step by step instructions for provisioning users and managing access.

Kentucky Online Gateway (KOG) Overview

The Kentucky Health Information Exchange (KHIE) utilizes the Kentucky Online Gateway (KOG) to authenticate an individual is part of an organization which has a signed Participation Agreement with KHIE. KOG is a secure Single Sign On (SSO) tool used to access the data in KHIE's clinical portal, the ePartnerViewer. To access the ePartnerViewer, KHIE ePartnerViewer Administrators and Authorized Users must establish a KOG account.

KHIE ePartnerViewer Administrator Functions

You have been identified as a KHIE ePartnerViewer Administrator (hereafter, referred to as Admin) and are required to create a KOG account. In this role, you are responsible for provisioning your organization's authorized users and maintaining that list. You are also tasked with assisting users with training needs. KHIE utilizes the 'Train the Trainer' approach and offers training guides and videos.

Once you complete your KOG account set up, you will be able to access the Organization Management Application located on your KOG dashboard. From the Organization Management Application, you can (1) provision your organization's authorized users and (2) manage your organization's list of authorized users. Managing the list of authorized users includes adding and removing user access, as required.

In addition to your role as the Admin, if you are authorized to view patient data, you must also be provisioned with one of the Clinical User roles to access the patient information.

How to Provision Users

This Quick Reference Guide provides instructions for provisioning your organization's authorized users. Additionally, it details how to manage your organization's list of authorized users.

Provisioning an Authorized User

- To provision your organization's authorized users, Select the **Organization Management** application. Click **Launch**.

- The name of your organization will display. Select the appropriate organization. Click **Manage**.

[Home](#) > [Organizations](#)

Org Name	<input type="text" value="Participant"/>	Search Type	<input type="text" value="Starts With"/>	<input type="button" value="Search"/>
Org Type	<input type="text" value="KHIE ePartnerViewer"/>			
Organization Name	Organization Type Name			
Participant ePartnerViewer Training	KHIE ePartnerViewer	<input type="button" value="Manage"/>		

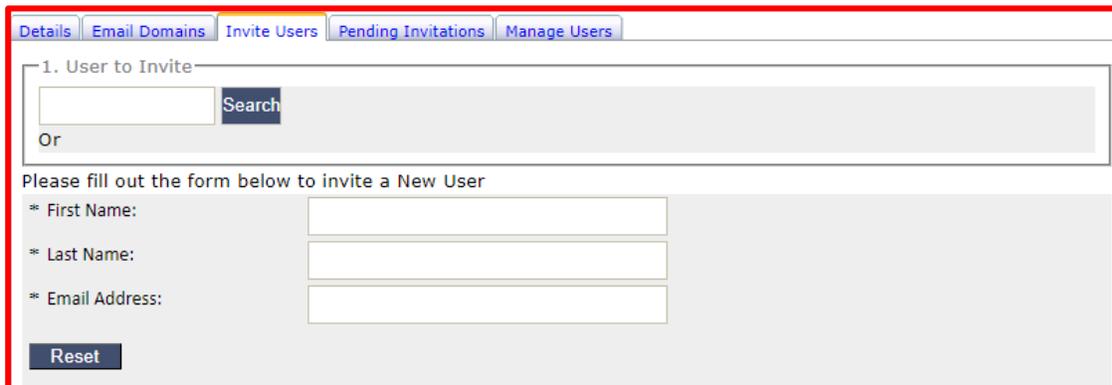
- The **Organization Details** display. To provision users, you must 'invite' the user to your organization. Click the **Invite Users** tab.

[Home](#)> [Organizations](#) > [Organization Details](#)

Details	Email Domains	<input type="button" value="Invite Users"/>	Pending Invitations	Manage Users
Organization Details				
Organization Name:	<input type="text" value="Participant ePartnerViewer Training"/>			
Organization Type:	<input type="text" value="KHIE ePartnerViewer"/>			
Source Unique ID:	<input type="text" value="10001620"/>			

4. The **Invite Users** page displays.

Home > Organizations > Participant ePartnerViewer Training > Organization Invites



Details | Email Domains | **Invite Users** | Pending Invitations | Manage Users

1. User to Invite

Search

Or

Please fill out the form below to invite a New User

* First Name:

* Last Name:

* Email Address:

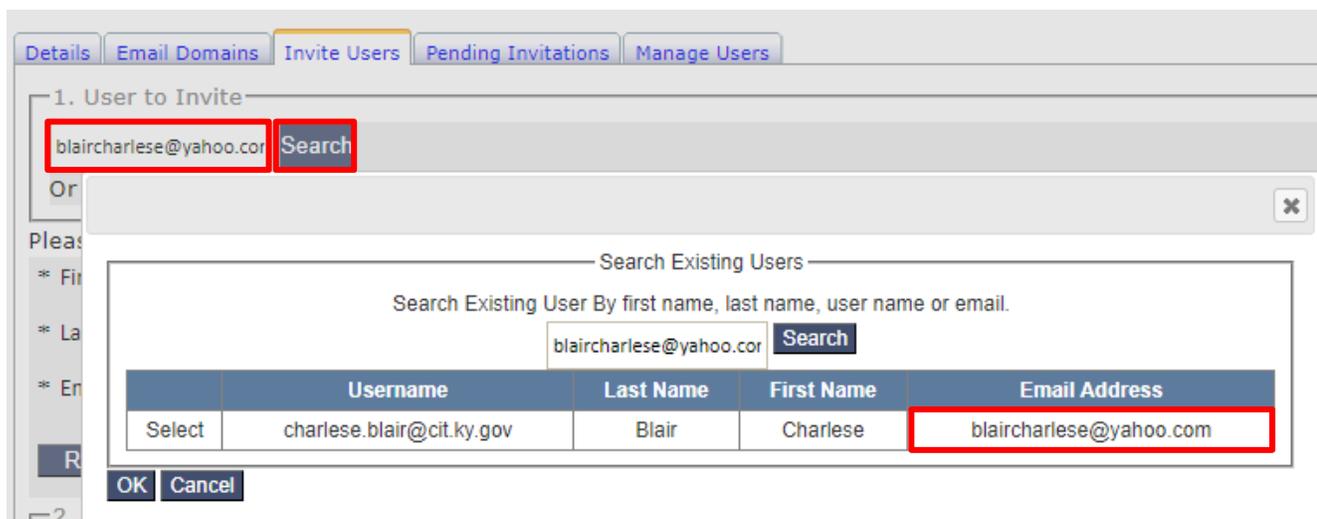
Reset

Determine if the Authorized User already has a KOG account

An organization's authorized user may have an existing KOG account. Prior to inviting a user, determine whether the user has an existing account.

If User has an Existing KOG Account

1. Enter the user's email address that was used to create the KOG account. Click **Search**.



Details | Email Domains | **Invite Users** | Pending Invitations | Manage Users

1. User to Invite

blaircharlese@yahoo.com Search

Or

Please fill out the form below to invite a New User

* First Name:

* Last Name:

* Email Address:

Reset

OK Cancel

2.

Search Existing Users

Search Existing User By first name, last name, user name or email.

blaircharlese@yahoo.com Search

	Username	Last Name	First Name	Email Address
Select	charlese.blair@cit.ky.gov	Blair	Charlese	blaircharlese@yahoo.com

- If no existing account matches the criteria, no user information will be displayed.



Search Existing Users

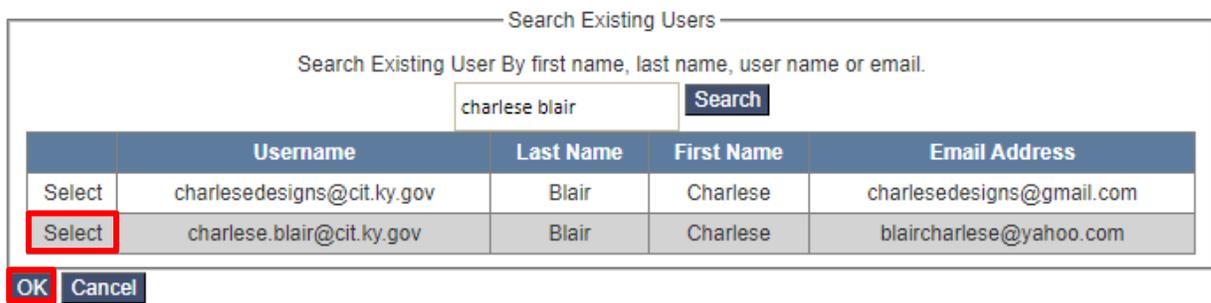
Search Existing User By first name, last name, user name or email.

Search

No User Displayed

OK Cancel

- If there is a matching account for your authorized user, click **Select** next to the appropriate name. Click **OK**.



Search Existing Users

Search Existing User By first name, last name, user name or email.

Search

	Username	Last Name	First Name	Email Address
Select	charlesedesigns@cit.ky.gov	Blair	Charlese	charlesedesigns@gmail.com
Select	charlese.blair@cit.ky.gov	Blair	Charlese	blaircharlese@yahoo.com

OK Cancel

- After clicking OK, *Select Roles to Invite* page displays. Click *Add* next to the appropriate role selection(s) to assign authorized user with the appropriate role(s).

Please Note: A User can have only one Clinical User role. Select the Clinical User role that most closely describes the User's job description. All Clinical User roles have access to the same patient health information. The designation of the specific Clinical User role is in place for KHIE to monitor which disciplines are utilizing the data in KHIE.

The Clinical User roles include Care/Case Manager, Epidemiologist, Health Records Admin, Infection Control Clinician, Information Technology Associate, Nurse, Nurse Practitioner, Other Healthcare Clinician, Paramedic, Pharmacist, Physician, Physician Assistant.

Add-on roles include Access Admin, DDELR Submitter, Event Notification Admin, Manual Case Reporter, Manual Data Submitter, PACS Administrator. These roles are restricted from viewing patient health information. These roles can be *added on* to any Clinical User role to enable viewing of patient health information.

2. Select Roles To Invite

Organization Admin Group(s)

KHIE ePartnerViewer Admin

Organization Roles

Role Name	App Name	
Access Admin	KHIE ePartnerViewer	Add
Care/Case Manager	KHIE ePartnerViewer	Add
DDELR Submitter	KHIE ePartnerViewer	Add
Epidemiologist	KHIE ePartnerViewer	Add
Event Notification Admin	KHIE ePartnerViewer	Add
Health Records Admin	KHIE ePartnerViewer	Add
Infection Control Clinician	KHIE ePartnerViewer	Add
Information Technology Associate	KHIE ePartnerViewer	Add
Manual Case Reporter	KHIE ePartnerViewer	Add
Manual Data Submission	KHIE ePartnerViewer	Add
Nurse	KHIE ePartnerViewer	Add
Nurse Practitioner	KHIE ePartnerViewer	Add
Other Healthcare Clinician	KHIE ePartnerViewer	Add
PACS ADMINISTRATOR	KHIE ePartnerViewer	Add
Paramedic	KHIE ePartnerViewer	Add
Pharmacist	KHIE ePartnerViewer	Add
Physician	KHIE ePartnerViewer	Add
Physician Assistant	KHIE ePartnerViewer	Add

4. Click *Send Pending Invitations*. This completes the process.

3. Selected Roles

Role Name	App Name		Remove
Other Healthcare Clinician	KHIE ePartnerViewer	View/Edit	Remove

Send Pending Invitations

Note: As an Admin, in addition to provisioning your organization’s authorized users, you can provision other users as Admins. Users with the Admin role cannot view patient data without also being provisioned with a Clinical User role.

2. Select Roles To Invite

Organization Admin Group(s)

KHIE ePartnerViewer Admin

Organization Roles

Role Name	App Name	
Access Admin	KHIE ePartnerViewer	Add
Care/Case Manager	KHIE ePartnerViewer	Add

If User does not have an existing KOG Account

Fill out all required fields marked with an asterisk (*). Select the **appropriate** roles. Click **Add**. Click **Send Pending Invitations**. This completes the process.

Organizations > Test 3 > Organization Invites

Details | Email Domains | **Invite Users** | Pending Invitations | Manage Users

1. User to Invite

Search

Or

Please fill out the form below to invite a New User

* First Name:

* Last Name:

* Email Address:

2. Select Roles To Invite

Organization Admin Group(s)

KHIE ePartnerViewer DEV Admin

Organization Roles

Role Name	App Name	
Clinical User	KHIE ePartnerViewer DEV	<input type="button" value="Add"/>

3. Selected Roles

Step 1: Fill out all required fields marked with an asterisk (*)

Step 2: Click Add

Step 3: Click Send Pending Invitations

Checking the Status of Invitations Sent

Click on the **Pending Invitations** tab to view the status of the invitations you've sent.

The authorized User will receive an email from KOG that contains a link. The instructions will direct the user to create a KOG account or to login to an existing KOG account. The email is active for 7 days but the registration link in the email is valid for a one-time click. That means that once the *link to proceed* has been clicked, the user must complete the registration. If the link expires, you will be required to provision the user again.

Invited Users						
<input type="text"/>		Search Users				
First Name	Last Name	Email Address	Date	Role Name	Role Status	Remove Invitation
Riley	Hawes	rihawes@deloitte.com	4/27/2023	KHIE ePartnerViewer - Information Technology Associate	New	Delete
				KHIE ePartnerViewer - Manual Data Submission	New	
				KHIE ePartnerViewer - Manual Case Reporter	New	

Managing the List of Authorized Users

After the user completes the KOG account registration, the user's information will be stored under the **Manage Users** tab. As your organization's Admin, you are responsible for managing your organization's list of authorized users. An example of managing/maintaining that list would include removing a user from the list when the user leaves your organization.

If a user leaves the organization, click **Manage Users**. **Search** for the user. Click **Remove**.

Organization Users				
<input type="text"/>		Search Users		
First Name	Last Name	Email Address	Remove User From Organization	User Details
Ferdous	Amin	feamin@deloitte.com	Remove	Manage

Appendix A

Access Management Responsibilities

KHIE has the responsibility to

- ✓ Send a quarterly email reminder to Admins regarding managing and maintaining authorized users

Participant has the responsibility to

- ✓ Designate an Admin to authorize and provision users from your healthcare organization
- ✓ Direct the Admin to activate, terminate, suspend, or modify Users' access, as necessary
- ✓ Ensure HIPAA training related to protected health information is provided to all authorized users accessing the data in the ePartnerViewer
- ✓ Direct Admin to activate, terminate, suspend, or modify users' access
- ✓ Notify KHIE of events that may involve unauthorized access, use, or disclosure of information

Admin has the responsibility to

- ✓ Authorize and Provision Users from among organization staff
- ✓ Assign access roles to each authorized user
- ✓ Utilize the *Train the Trainer* approach to train authorized users
- ✓ Inform your staff of KHIE resources, i.e., training guides and videos
- ✓ Provide follow up training for your staff
- ✓ Activate, terminate, suspend, or modify users' access, as necessary
- ✓ Notify KHIE of events that may involve unauthorized access, use, or disclosure of information

As the Admin for your organization, you have agreed to manage your employee access to the patient health information in the ePartnerViewer. We recommend that you include KHIE in your employee hiring and exiting processes to efficiently manage your employees' access to data. Authorized employees will have vital patient health information from multiple sources available quickly and in one location.

Access must be immediately removed for those employees who no longer require access, who have resigned, or who have been terminated from your healthcare organization.

Please incorporate into your workflow a few minutes periodically to review your list of users.

Authorized User's has the responsibility to

- ✓ Complete training of the ePartnerViewer
- ✓ Not share usernames or passwords used for accessing the ePartnerViewer
- ✓ Not acquire or use the usernames or passwords of others
- ✓ Limit use of the health information in the ePartnerViewer to the activities permitted for user's job function
- ✓ Report potential unauthorized access, use, or disclosure of information in the ePartnerViewer to the KHIE Admin