HIE Administrator Tool User Guide

March 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

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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***
Understand HIE Admin Role & Responsibilities	Review HIE training materials in this training and on our website, or speak with our team.	CurrentCareRI.org/HIEAdmin
Provide users with CurrentCare policies & educational materials	Provide users with information about CurrentCare policies ***before*** their accounts are created	CurrentCareRI.org/Policies CurrentCareRI.org/HIEadmin
Add user accounts	Create user accounts in CurrentCare as directed by your practice management.	See the related section in this training
Assign (Provision) services to user accounts	Assign services to user accounts	See the related section in this training
Perform user audits ***every 90 days***	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 120.	***Recommendation***: Do this monthly to avoid user account suspensions.
Manage Existing Users	Update changes to user accounts & services, remove user accounts, reset user passwords	See the related section in this training

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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!

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Adding User Accounts

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

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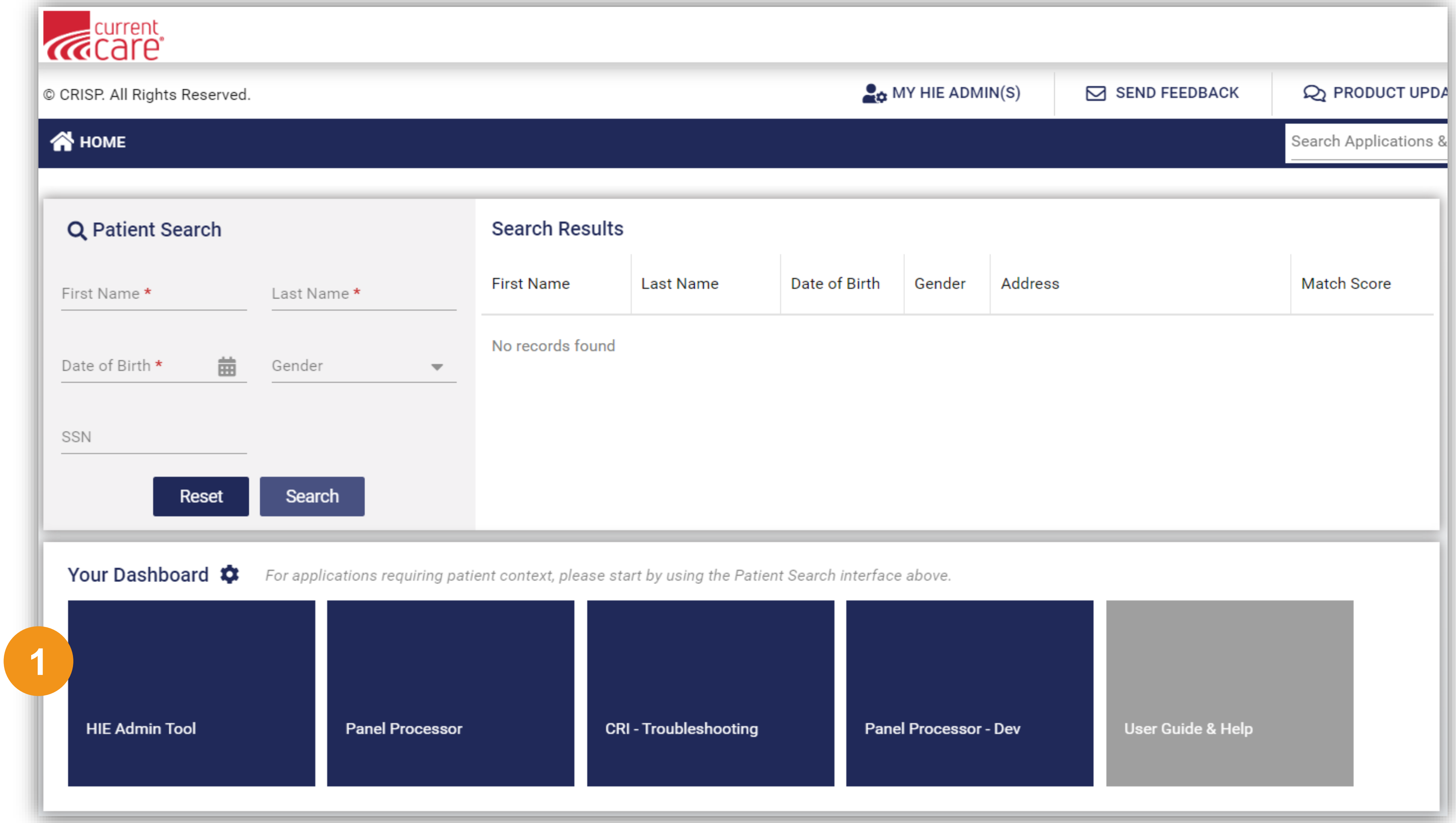
Accessing the HIE Admin Tool

1 Logging In

1

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



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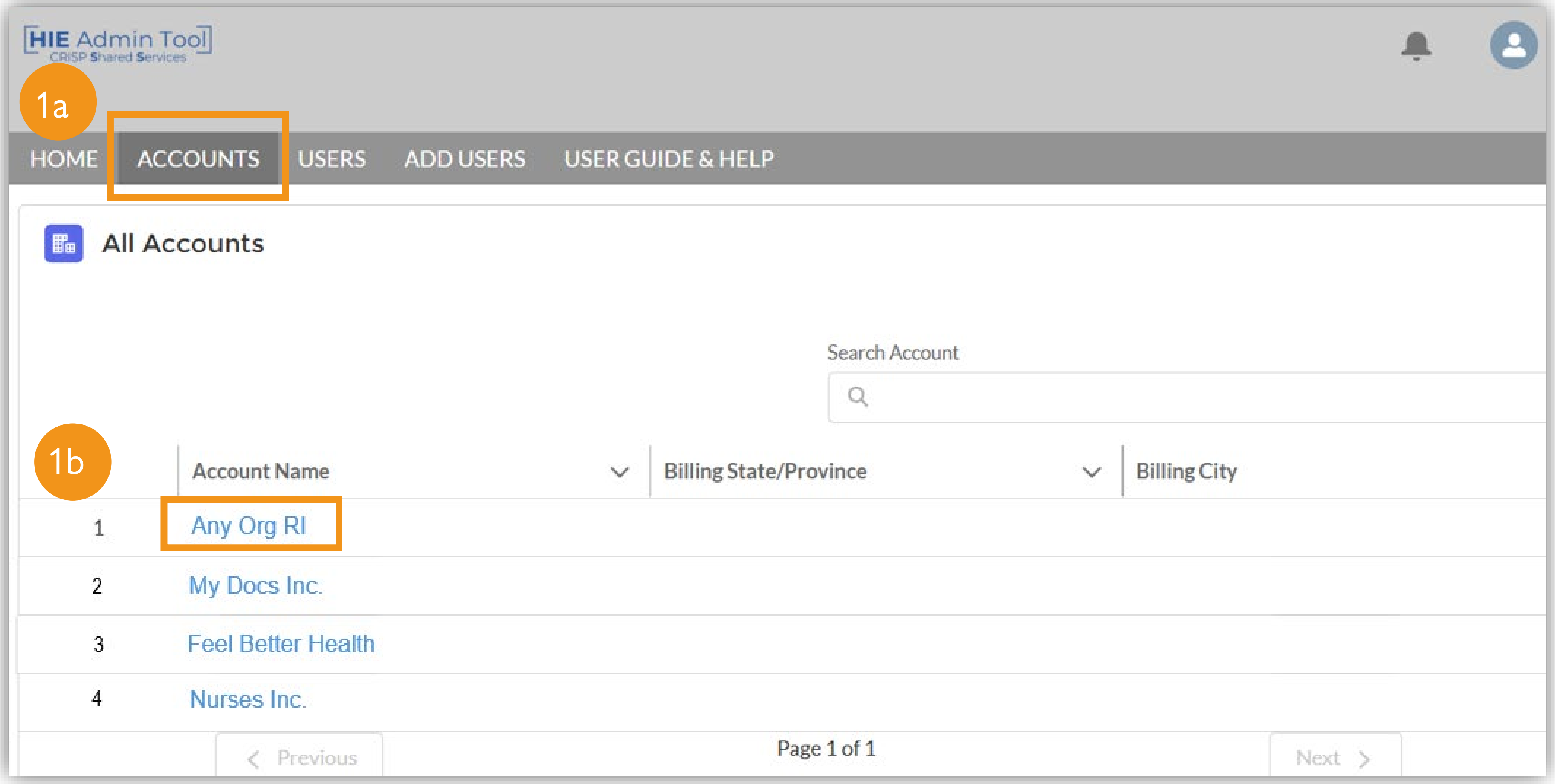
Navigate to Accounts

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.



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Adding Individual Users

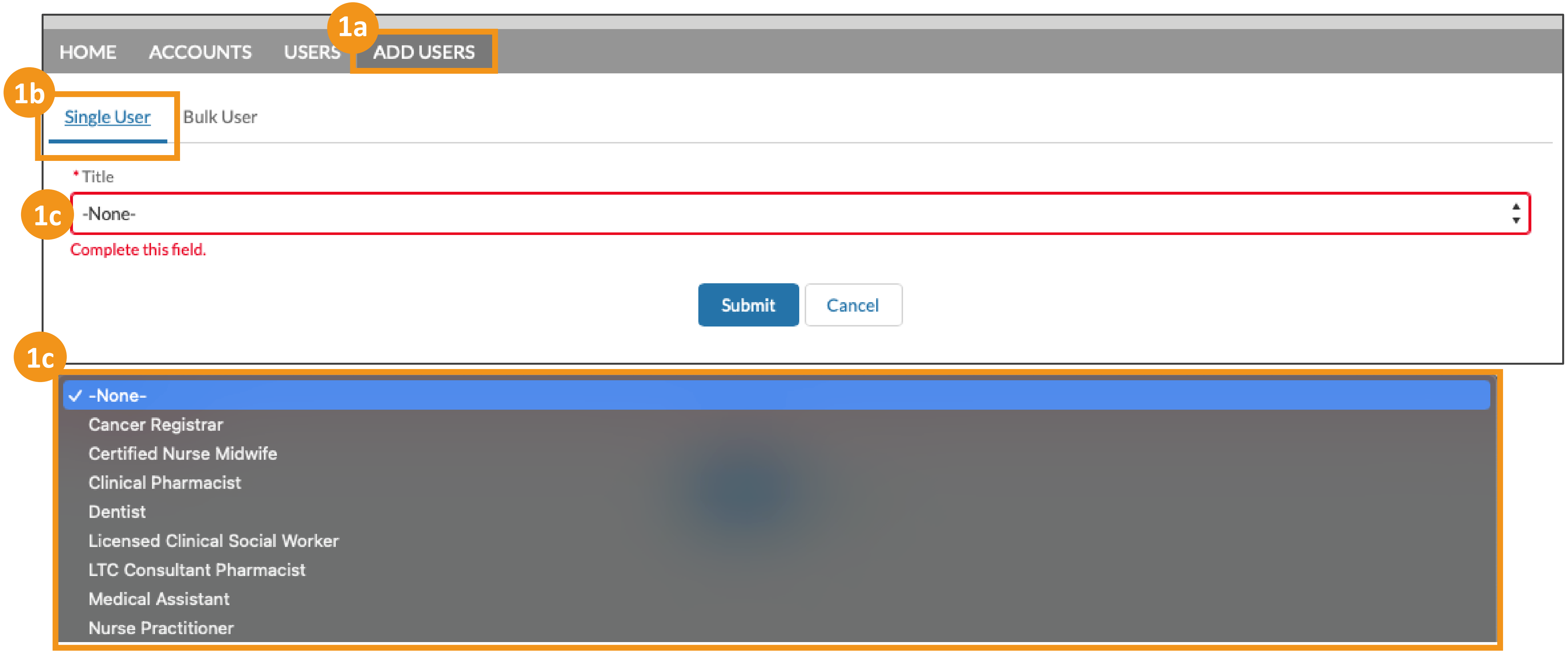
1 Selecting a Title

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



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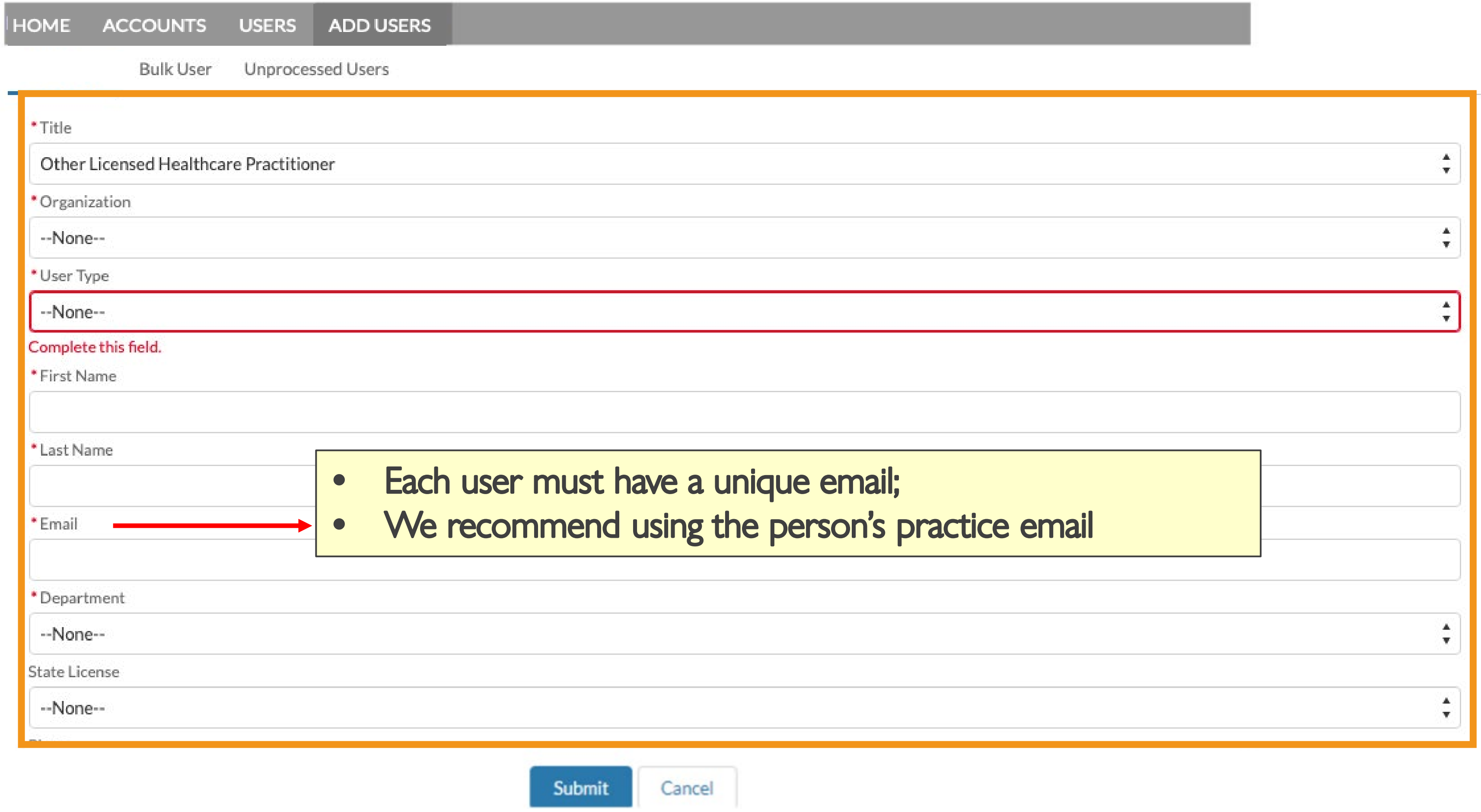
Adding Individual Users

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



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

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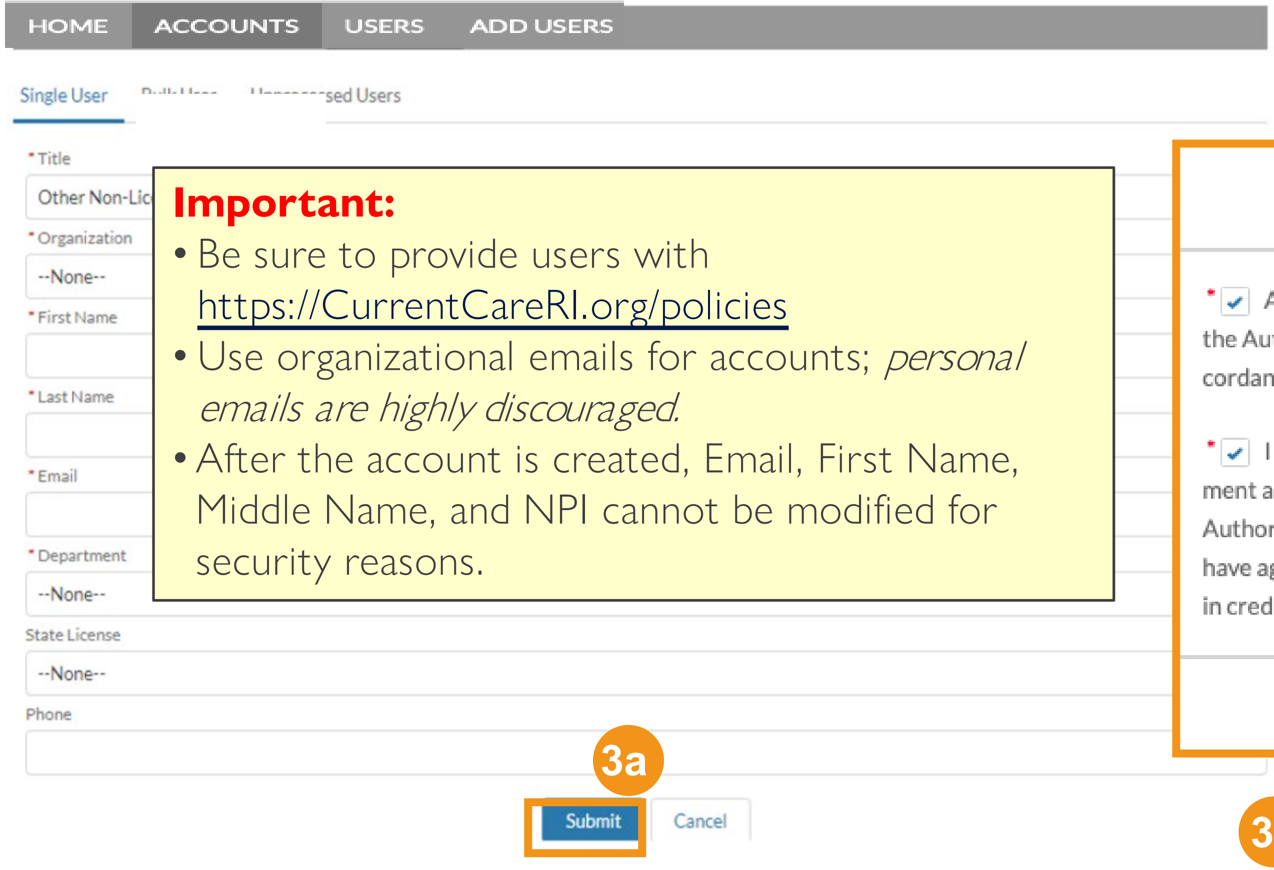
Adding Individual Users

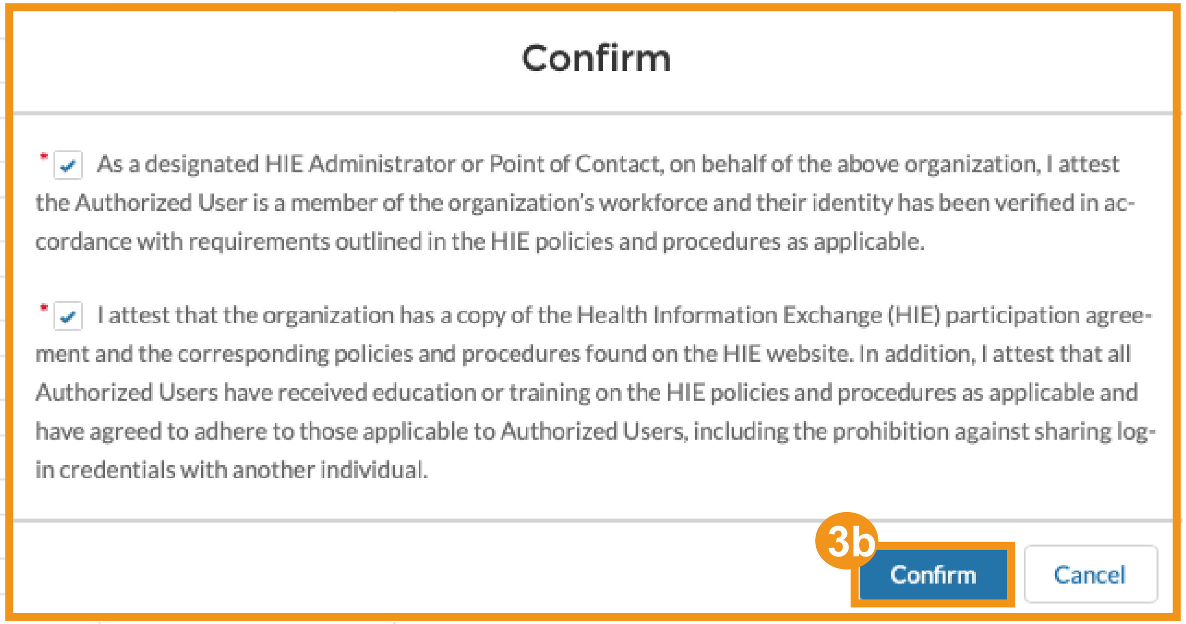
3 Submitting a New User & Attestation

(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)



Important:

- 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.



3c

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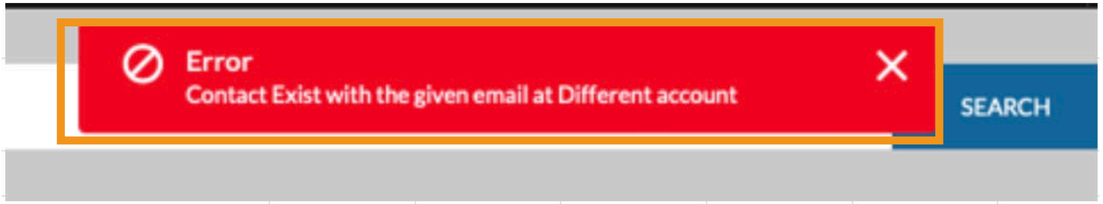
Adding Individual Users

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.*



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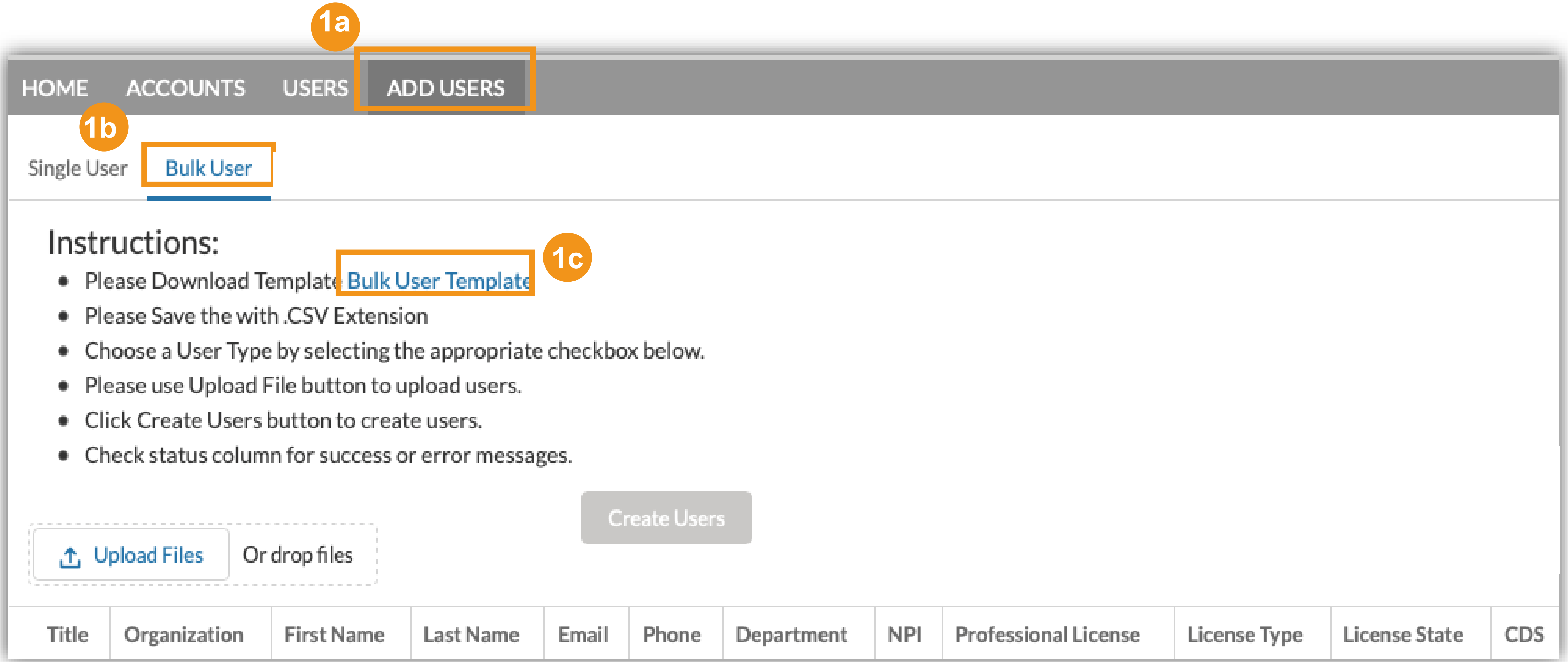
Adding Multiple Users

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.



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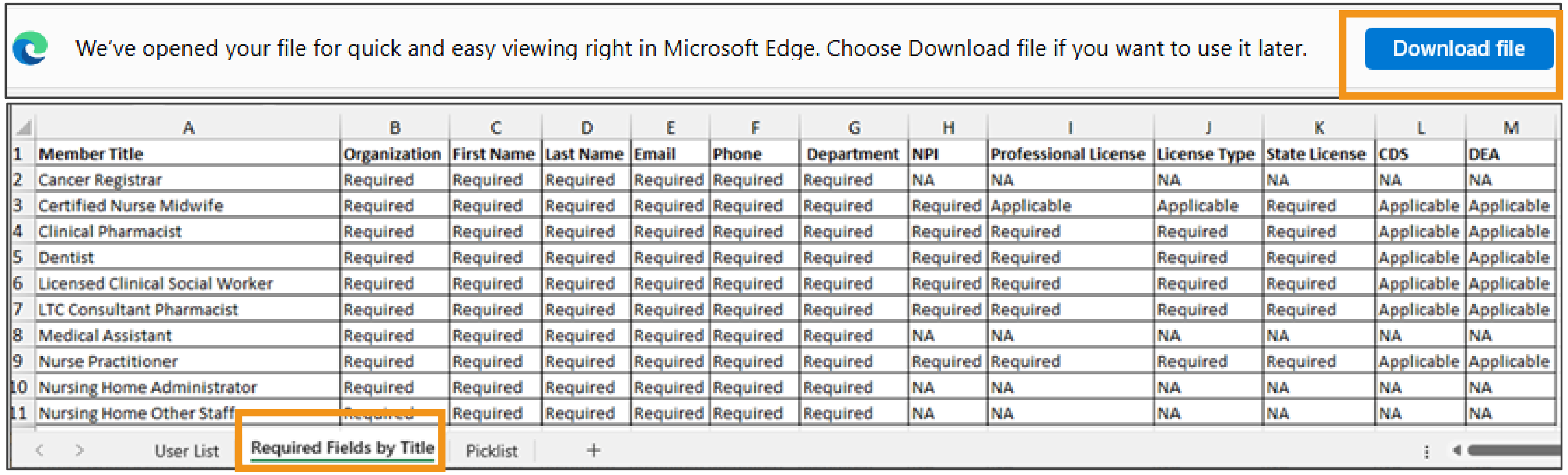
Adding Multiple Users

2 Follow your browser's instructions to download the **Bulk User Template**.

Note: it's an Excel file (.xlsx) with multiple tabs.

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

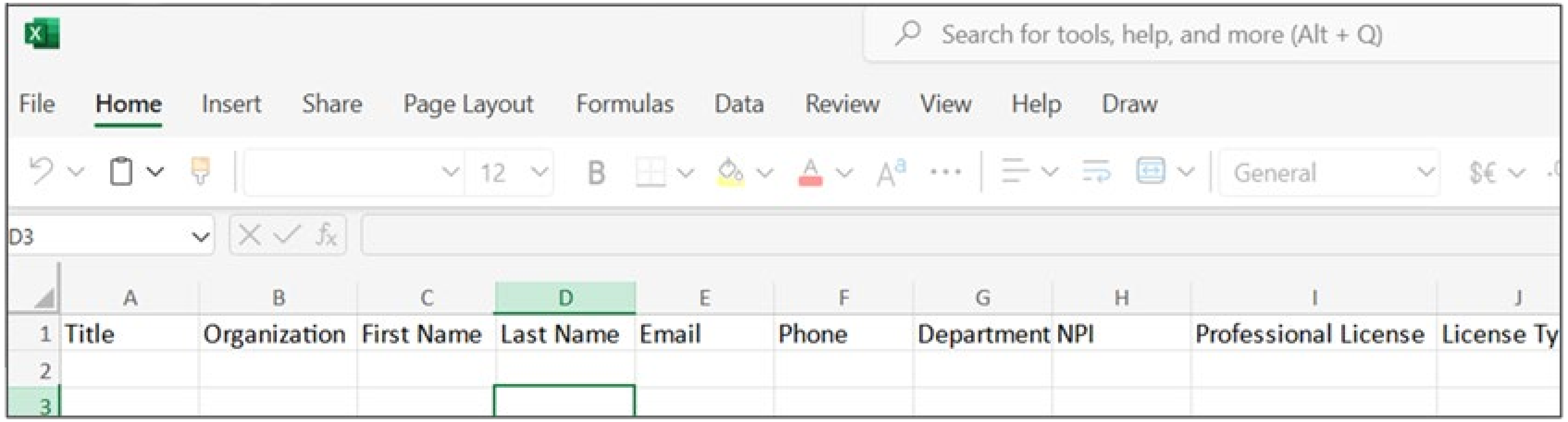
2a



Member Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Type	State License	CDS	DEA
Cancer Registrar	Required	Required	Required	Required	Required	Required	NA	NA	NA	NA	NA	NA
Certified Nurse Midwife	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable	Required	Applicable	Applicable
Clinical Pharmacist	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
Dentist	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
Licensed Clinical Social Worker	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
LTC Consultant Pharmacist	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
Medical Assistant	Required	Required	Required	Required	Required	Required	NA	NA	NA	NA	NA	NA
Nurse Practitioner	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
Nursing Home Administrator	Required	Required	Required	Required	Required	Required	NA	NA	NA	NA	NA	NA
Nursing Home Other Staff	Required	Required	Required	Required	Required	Required	NA	NA	NA	NA	NA	NA

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

2b



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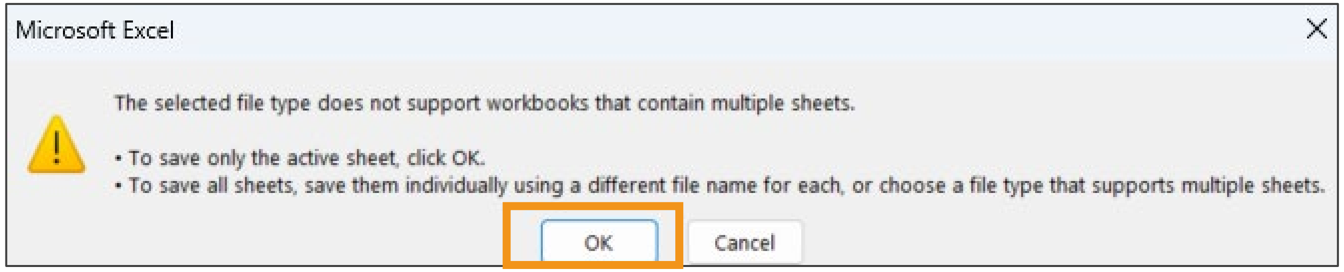
Adding Multiple Users

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.



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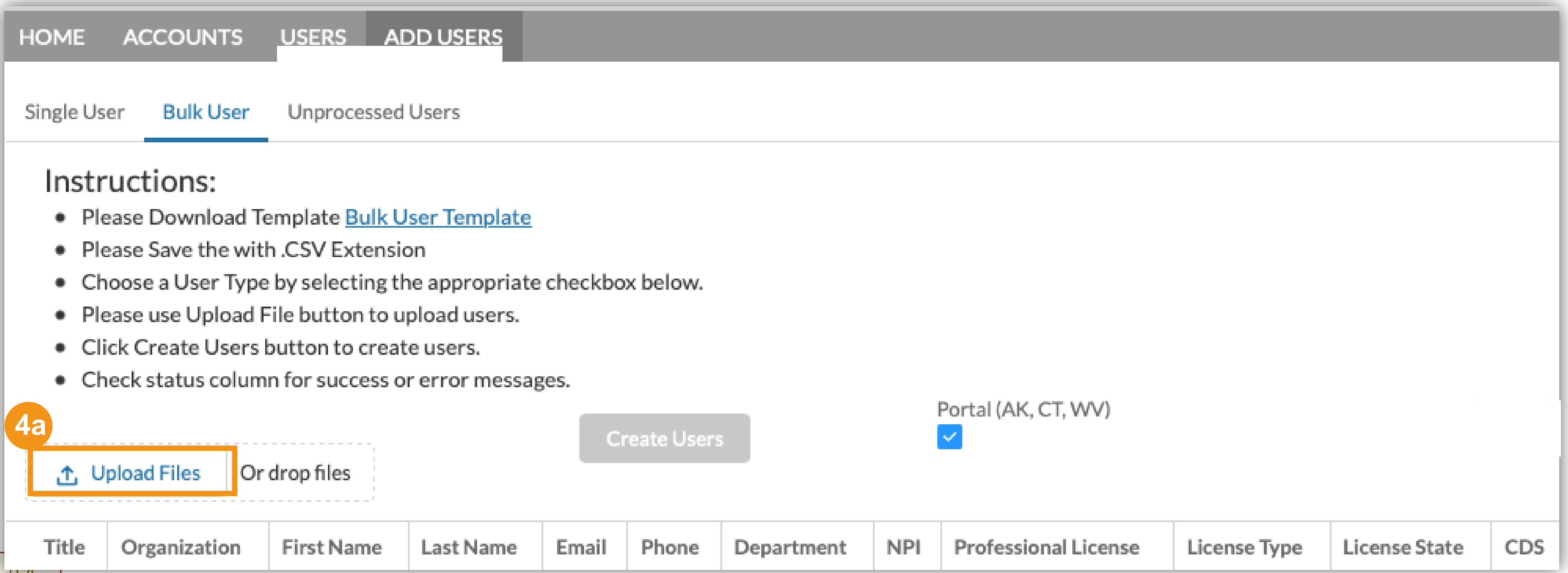
Adding Multiple Users

4 Uploading Files

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

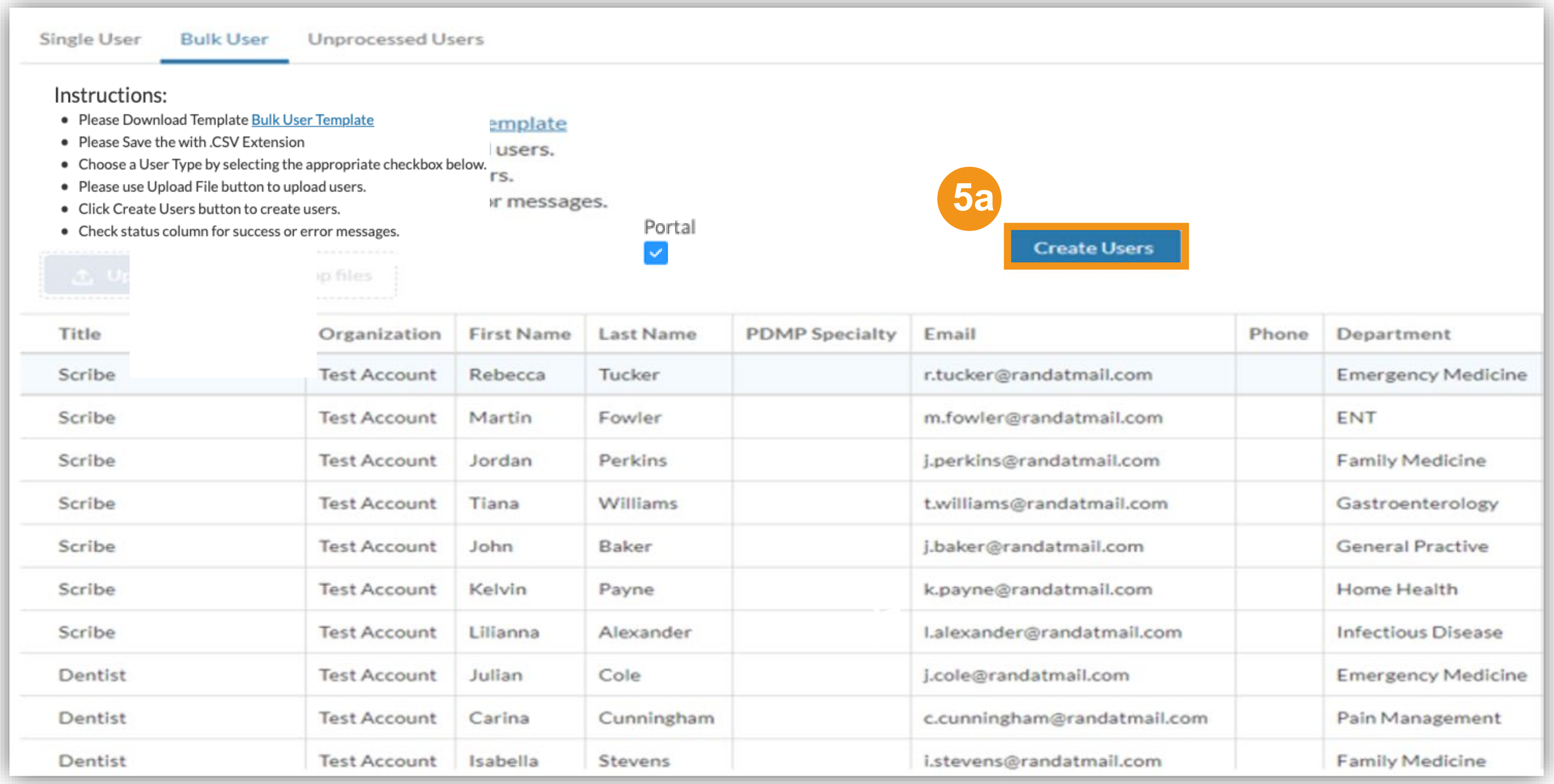
Note: Follow this same process to reactivate a user who is currently deactivated. Access to services for these users must be added again, see ***the Adding Services*** *section for detailed instructions.*



Adding Multiple Users

5 Creating Users

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



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

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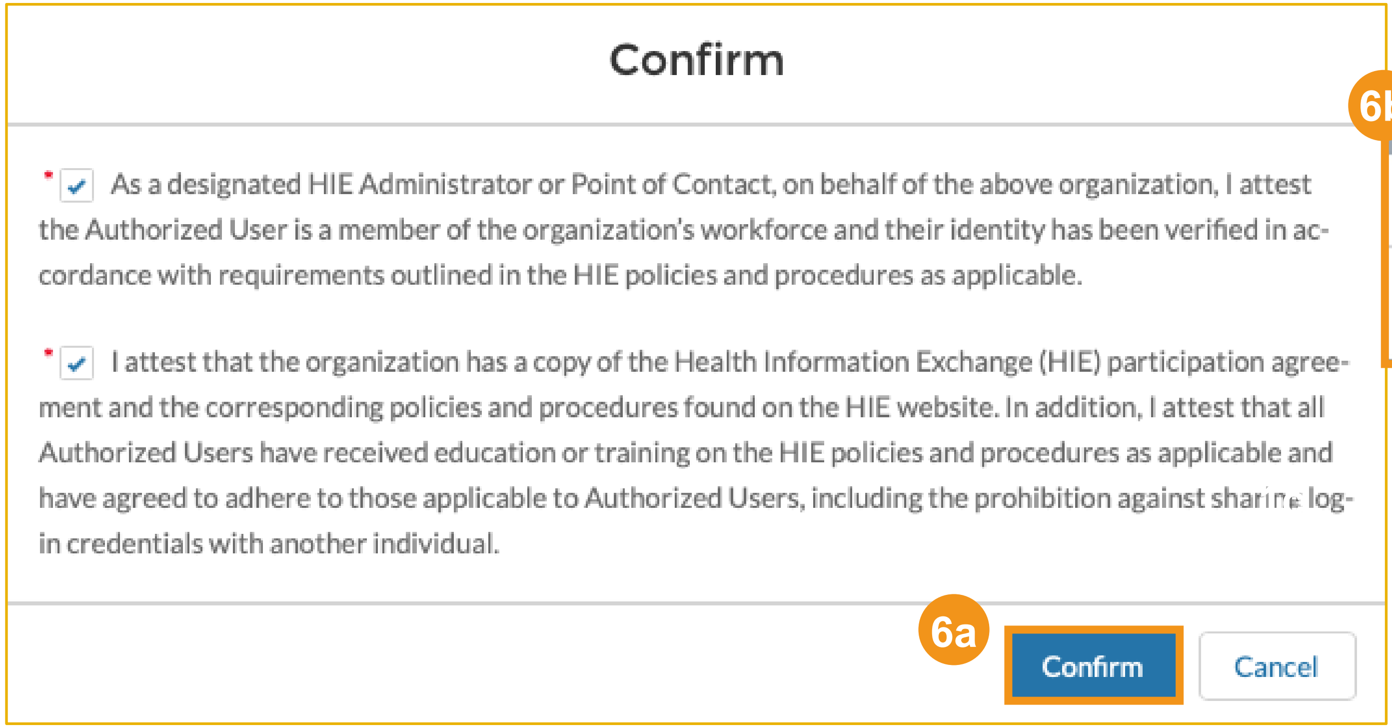
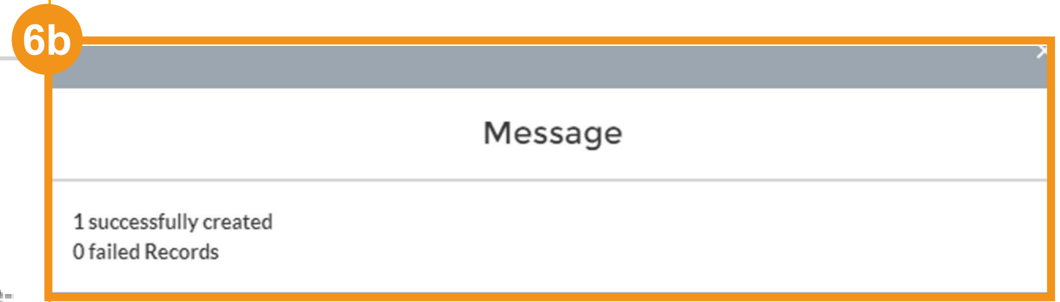
Adding Multiple Users

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





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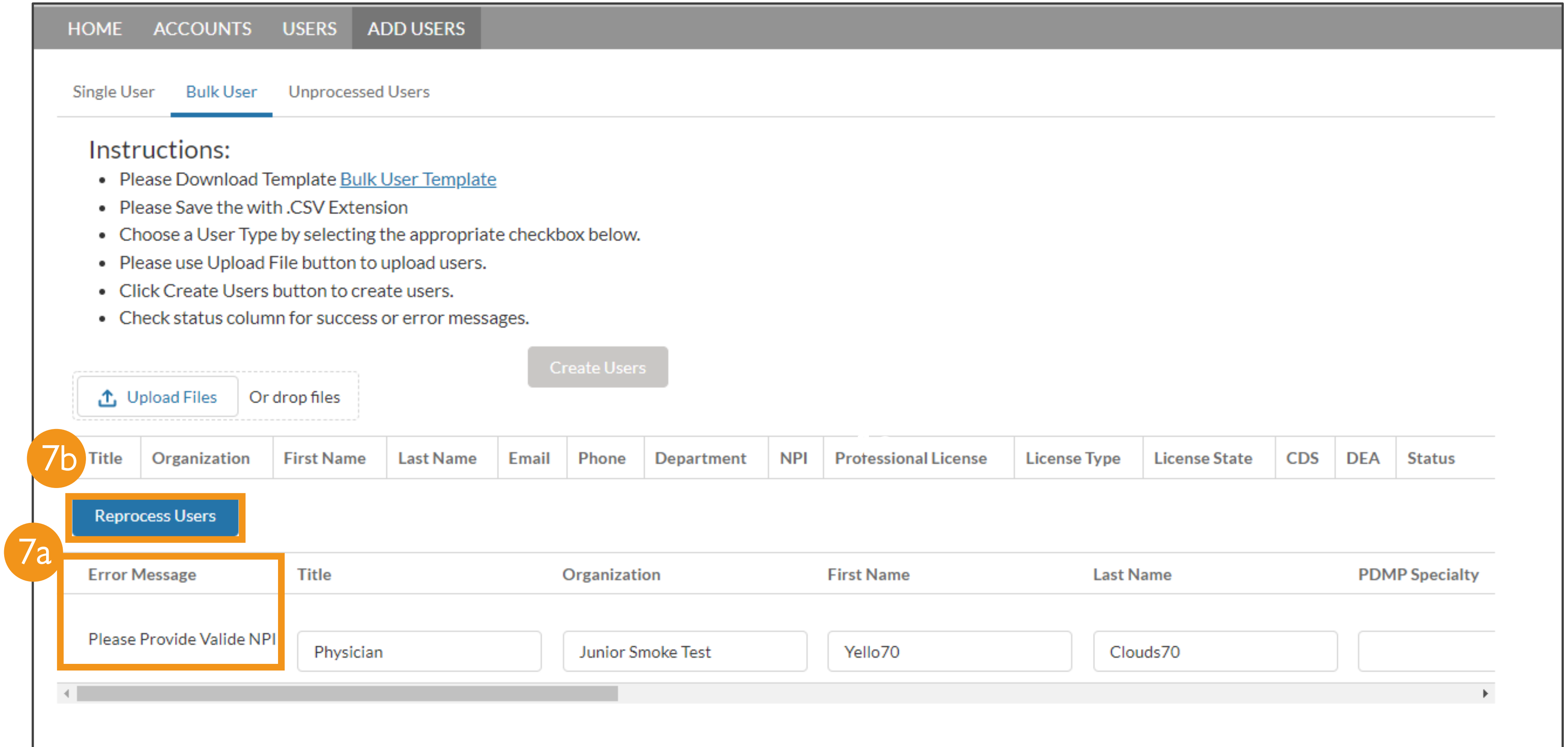
Reprocessing Users with Errors

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.*



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Assigning Services

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

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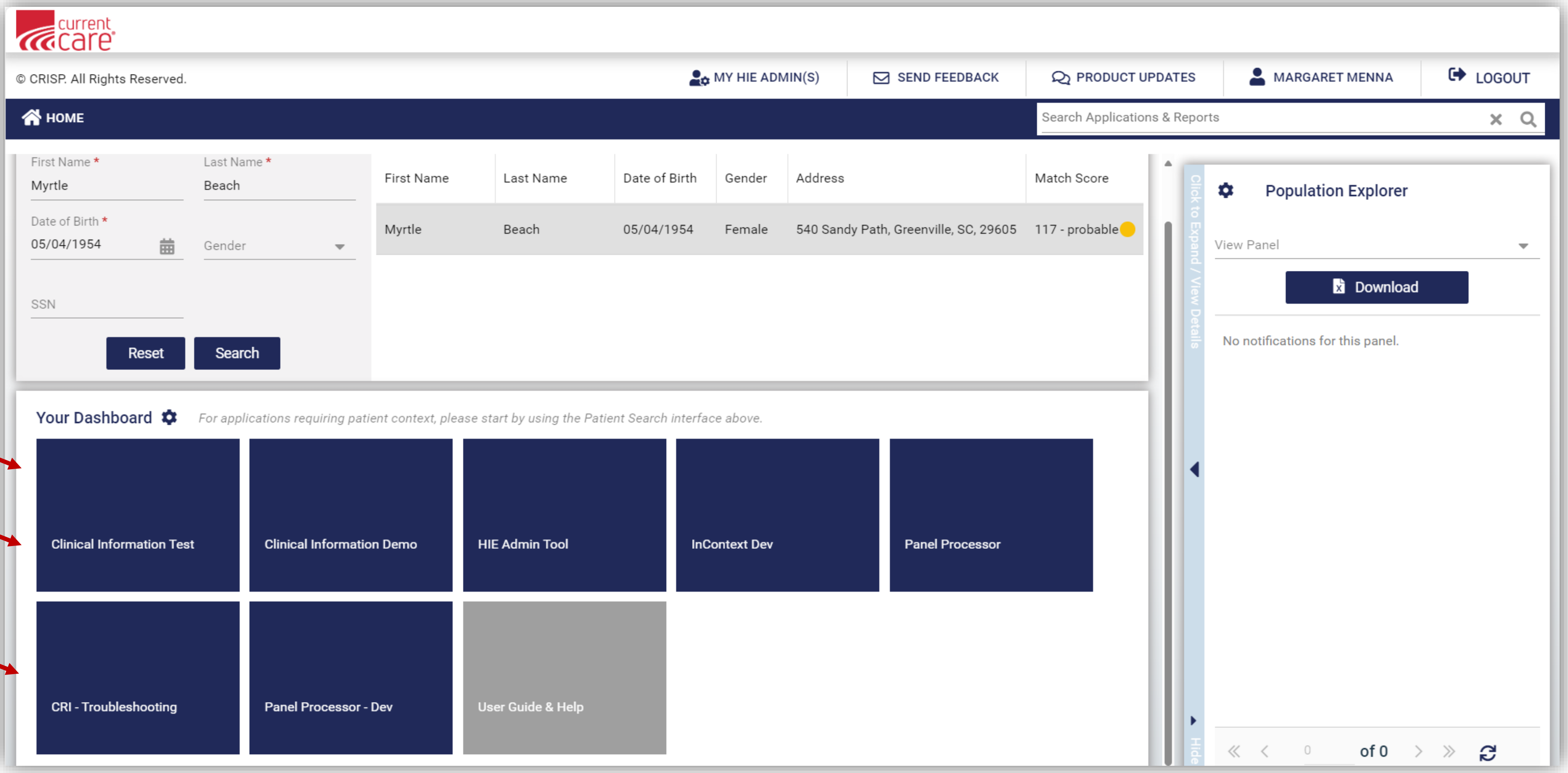
Assigning Services - Overview

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

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



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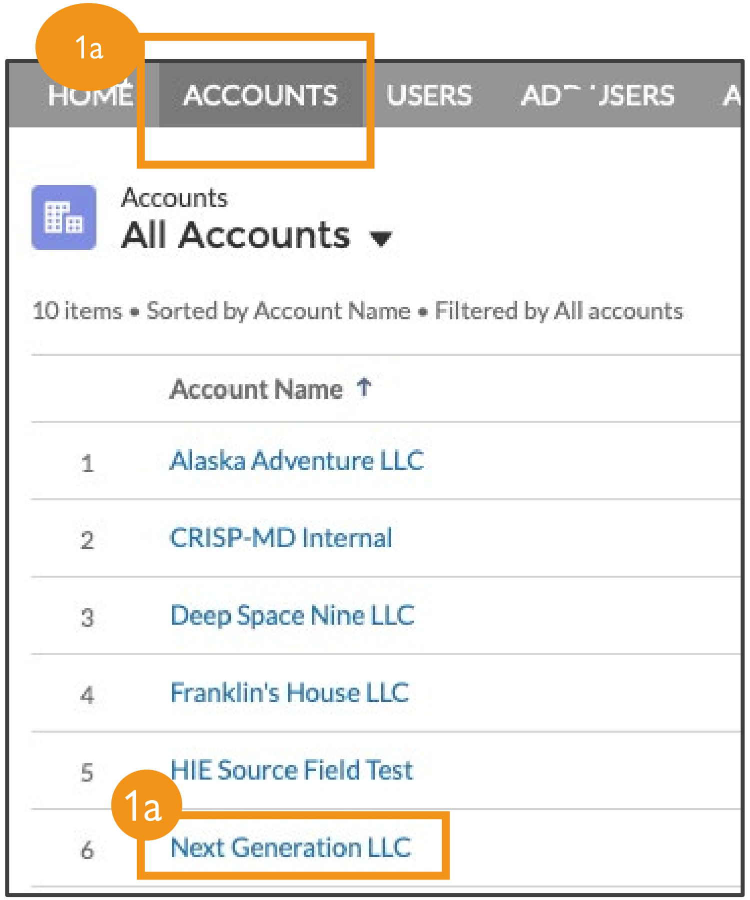
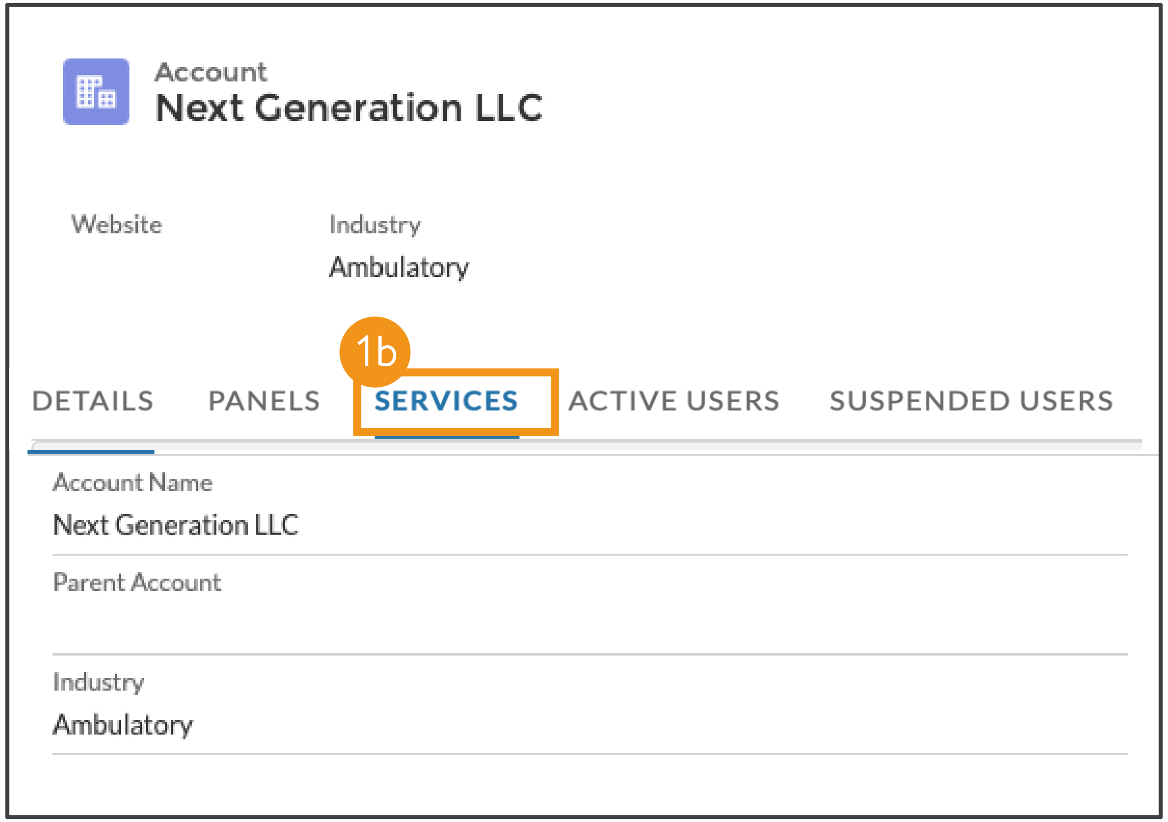
Assigning Services: Multiple Users

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





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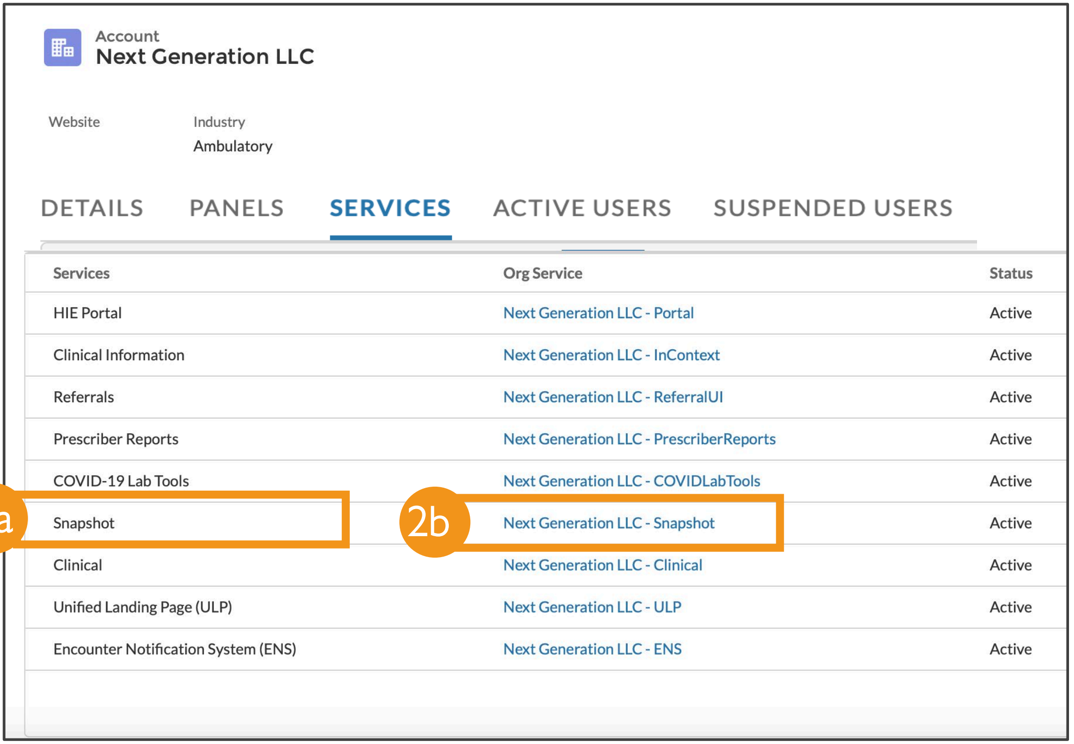
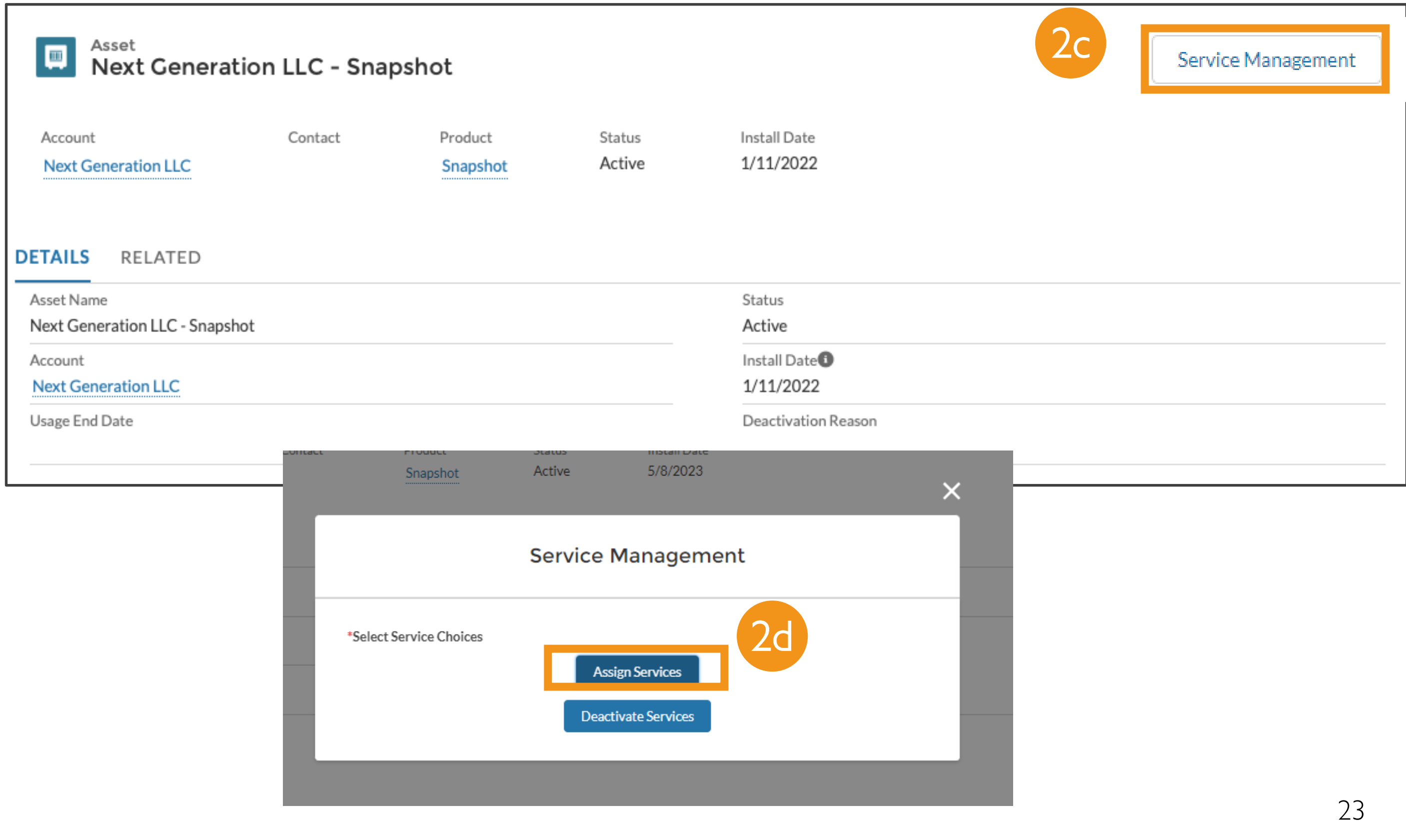
Assigning Services: Multiple Users

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**





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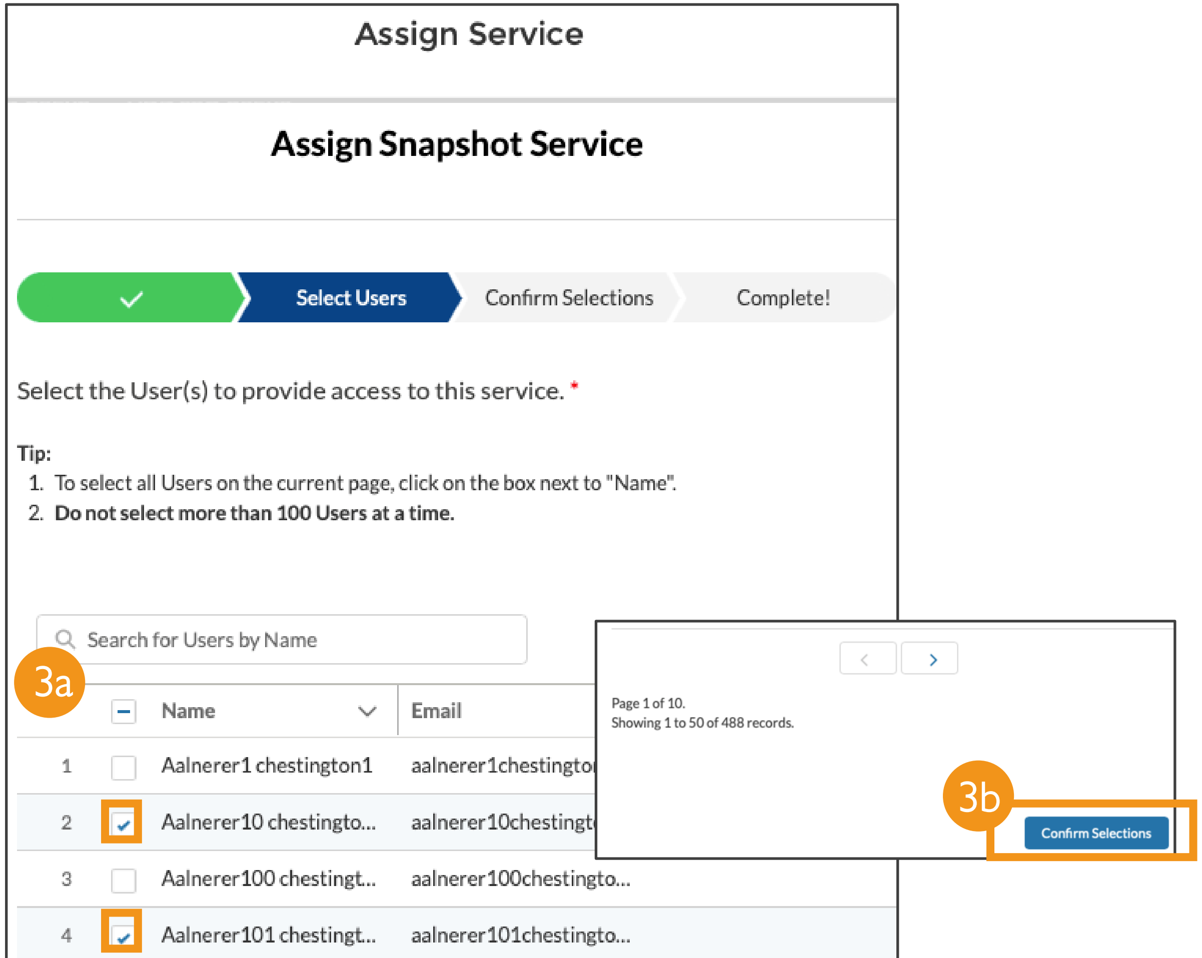
Assigning Services: Multiple Users

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*



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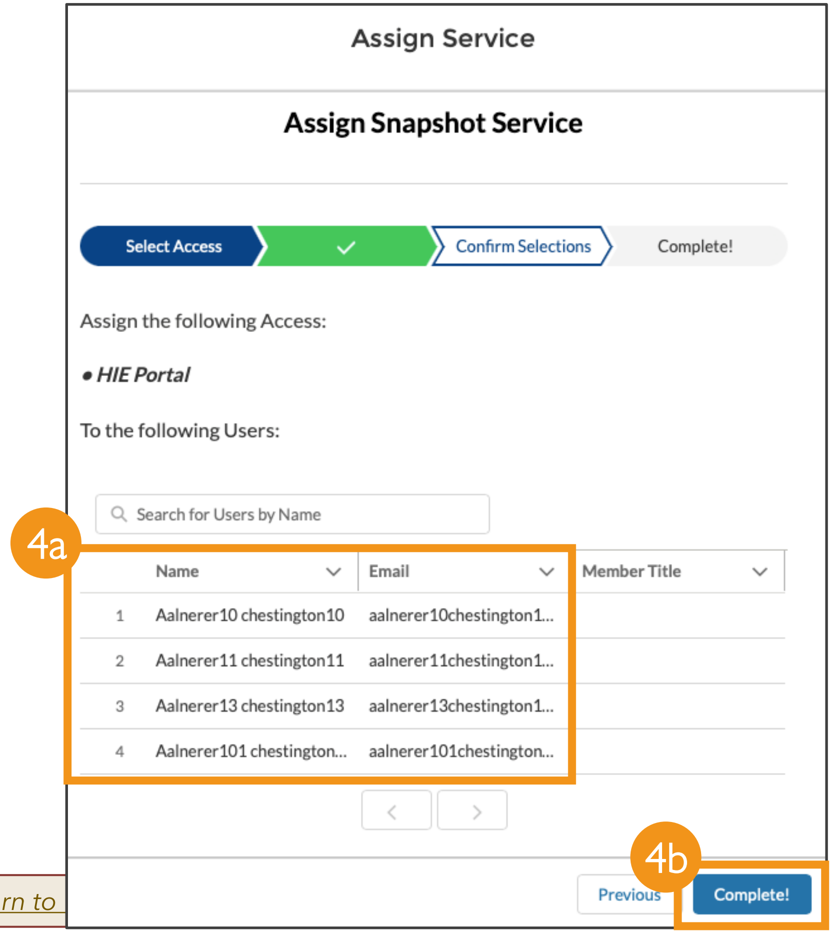
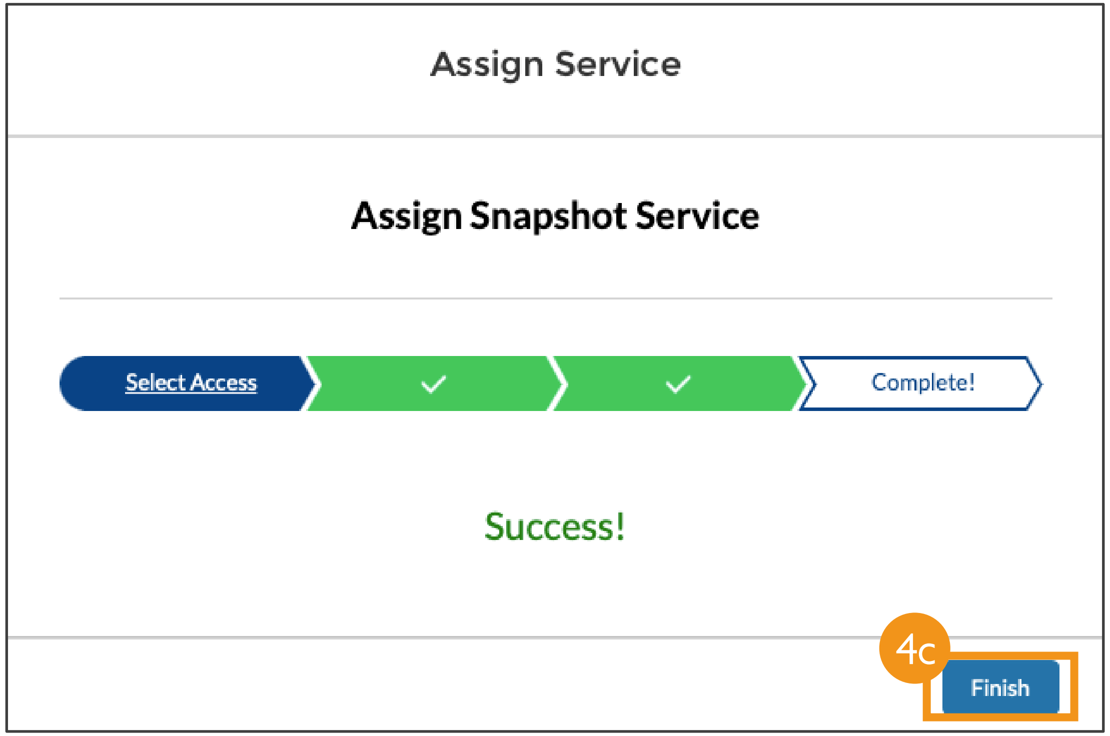
Assigning Services: Multiple Users

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**





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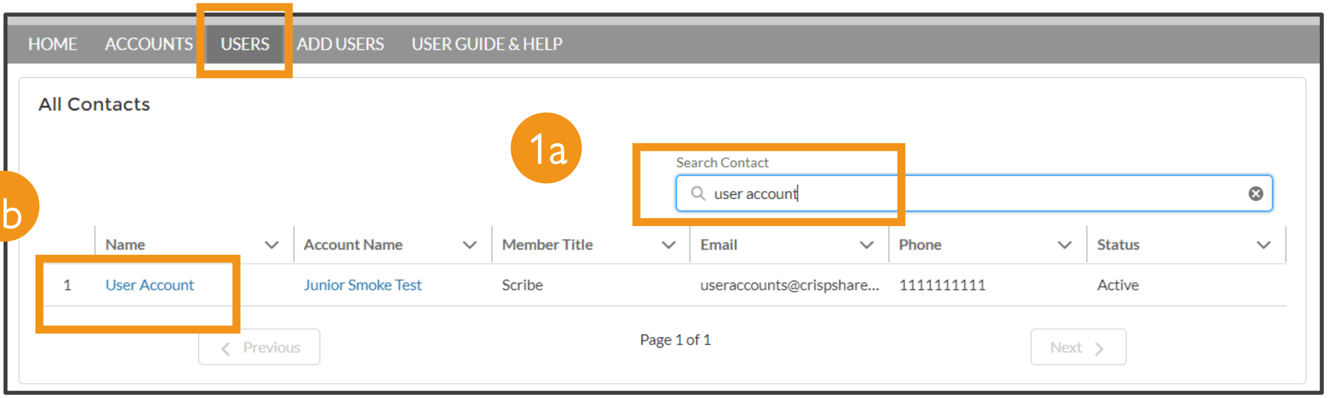
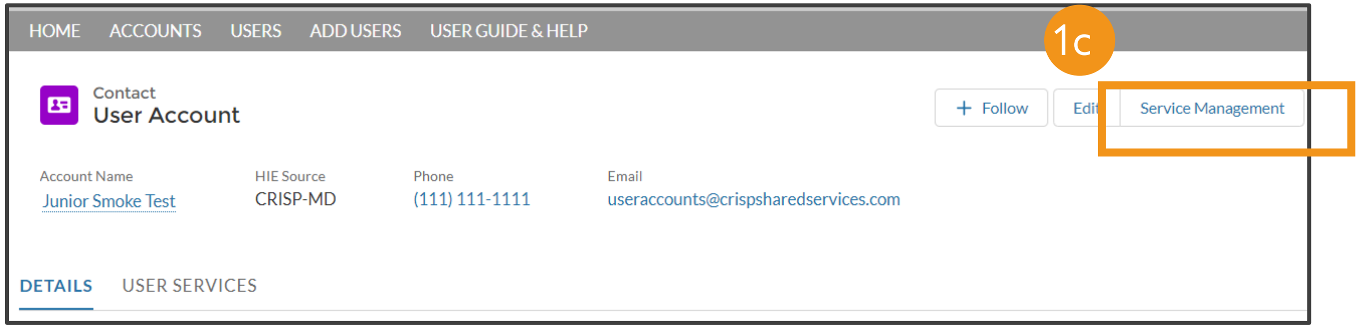
Assigning Services: Single User

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**





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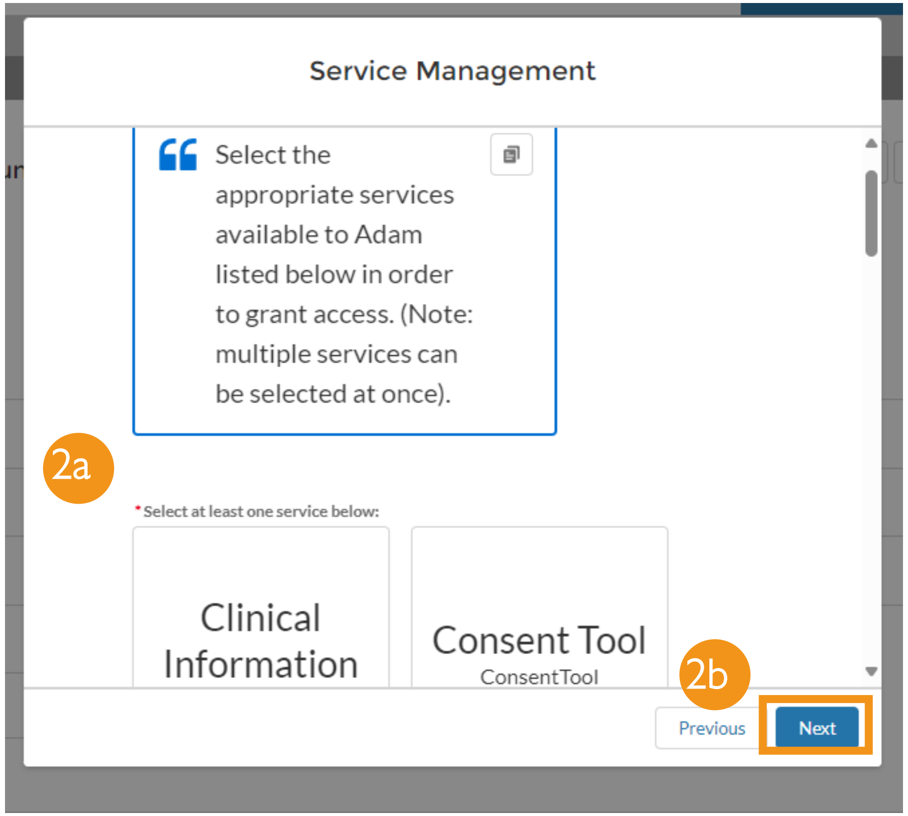
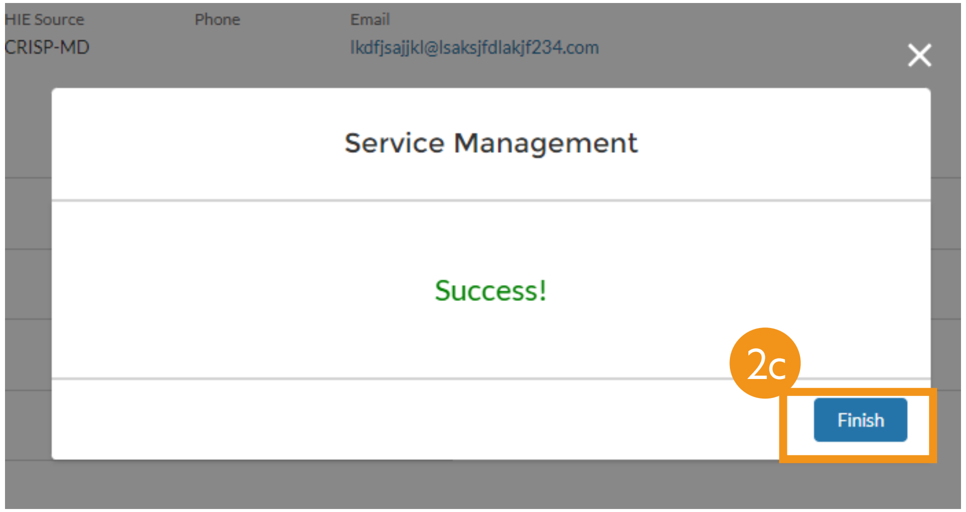
Assigning Services: Single User

2 Assign Services

(2a) Select the service you wish to assign to the user
(2b) Click **Next**
(2c) Click **Finish**





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User Audits

- are required every 90 days otherwise, users will be suspended
- at day 120, if still not audited, account will be deactivated

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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 120 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

Sandbox: HIE Admin Monthly Audit Reminder

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

To Penny Lane

Reply | Reply All | Forward

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.

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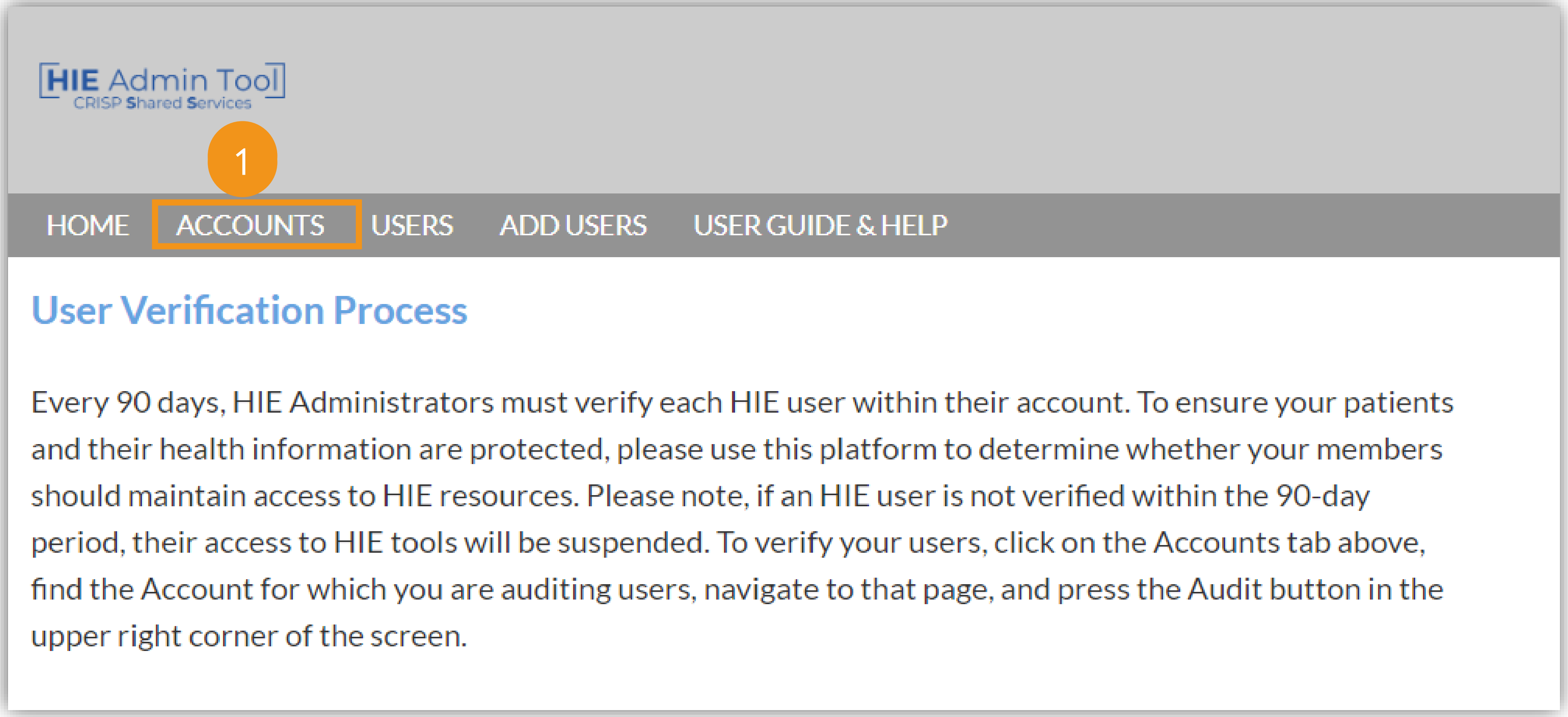
User Audits

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



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User Audits – Select an Account

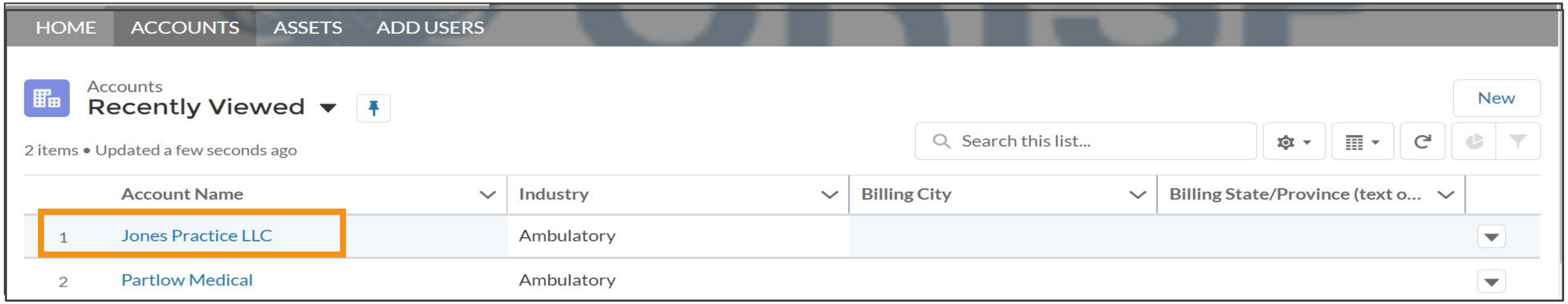
1 **Select an Account**

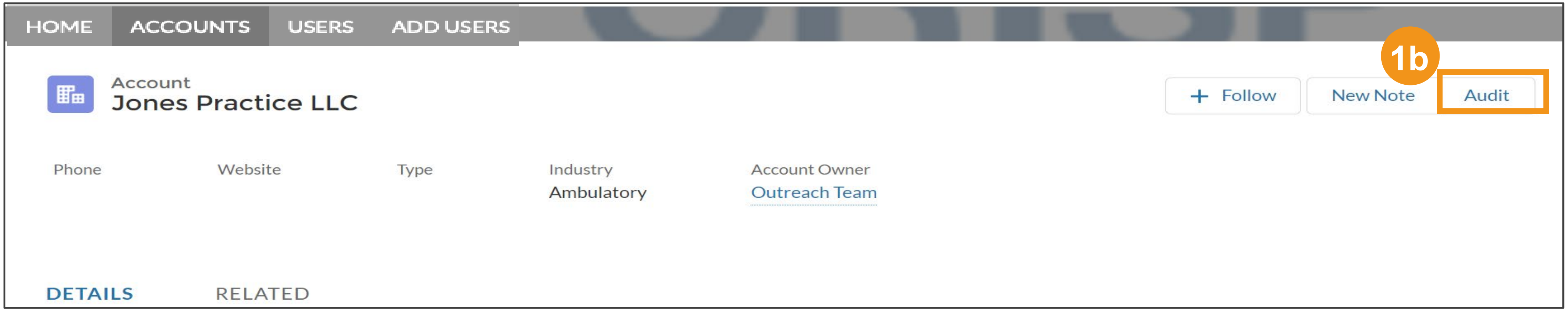
(1a) In the **Accounts** tab, click the <u>account name</u> you would like to audit.

Reminder: This could be your organization name or a different site name

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

1a





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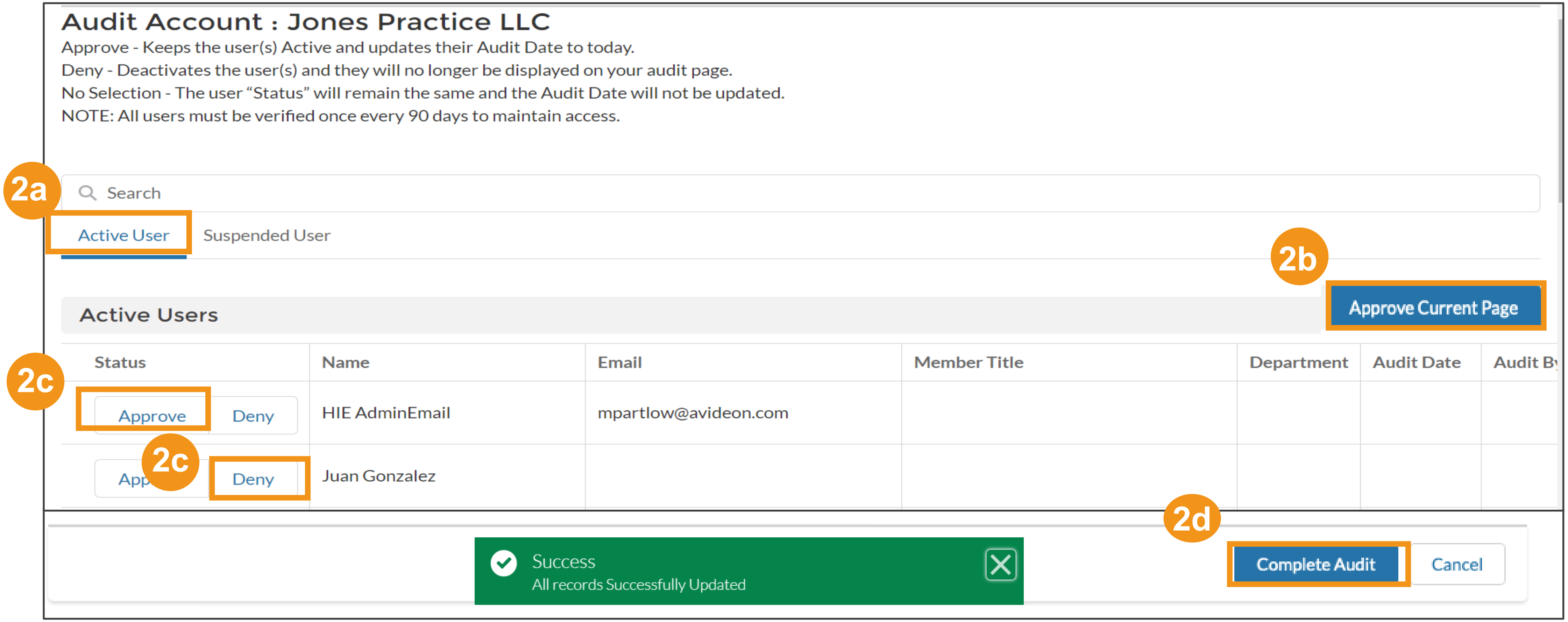
User Audits – Active Users

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**



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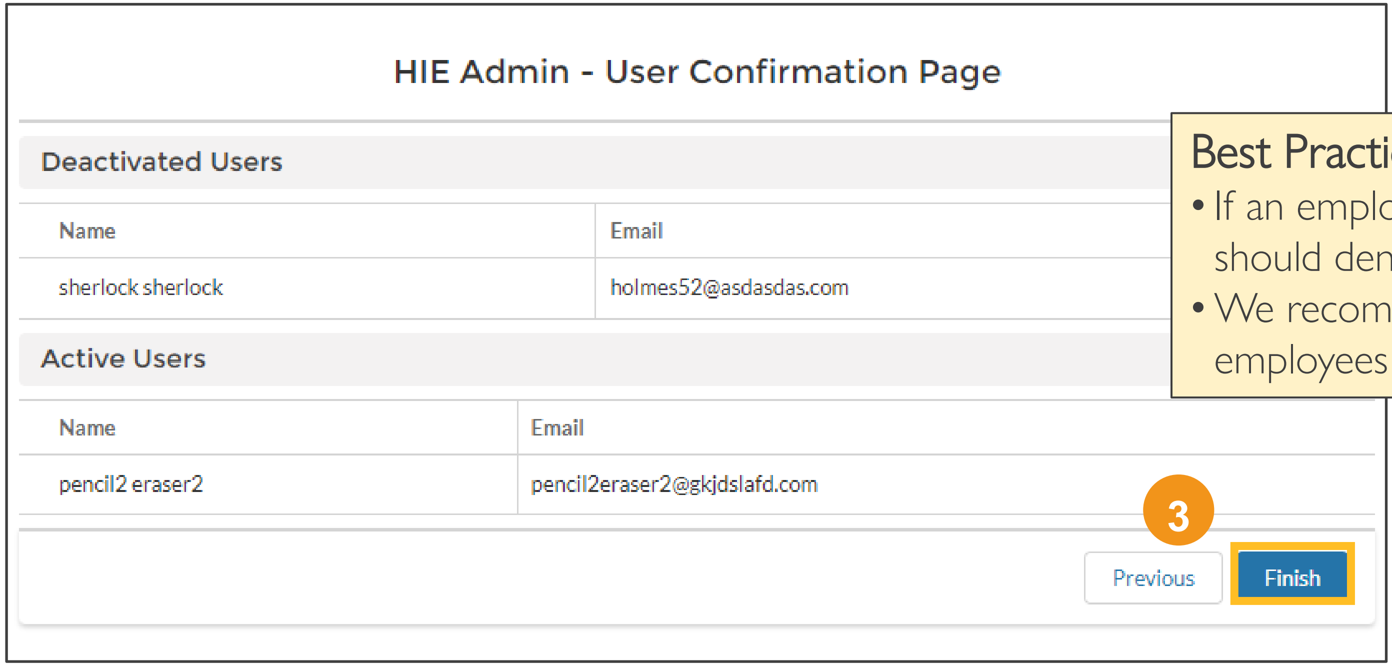
User Audits – Active Users

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



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.

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User Audits – Suspended Users

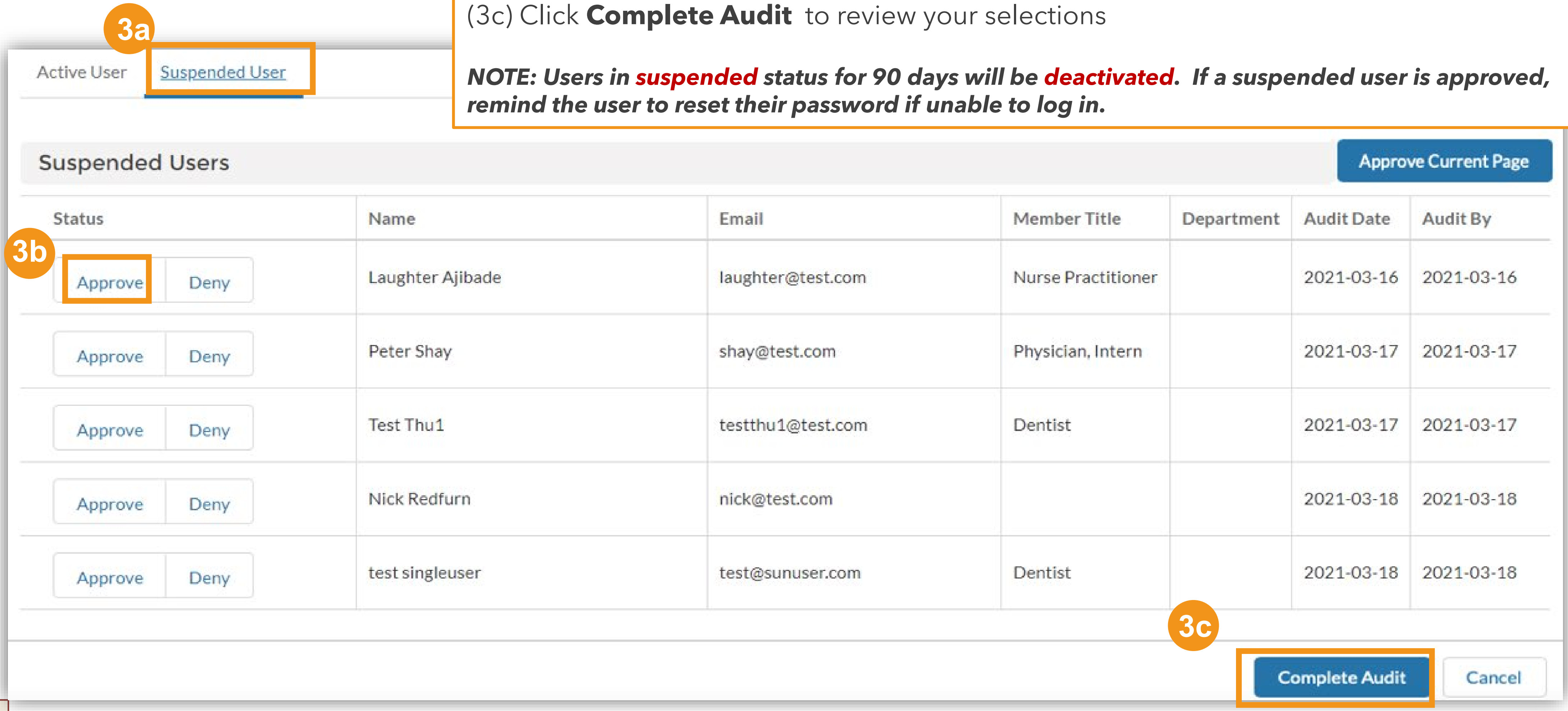
3 Managing Suspended Users

(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.



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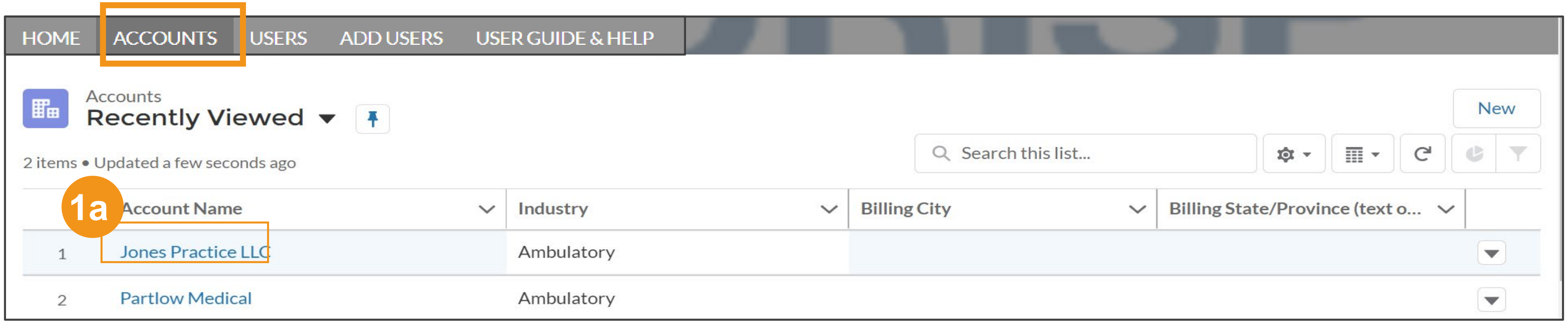
User Audits – Bulk Export User List

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



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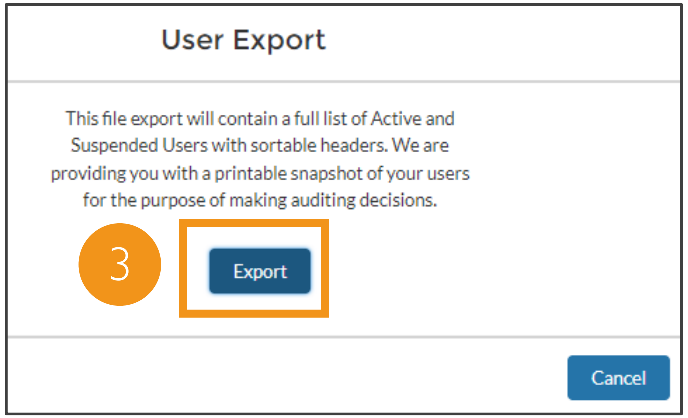
User Audits – Bulk Export User List

3

Click the **Export** link to confirm the Excel download.
Note: the file will contain a full list of Active and Suspended Users



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	

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Managing Existing Users

Edit User Details

Deactivating Services for a Single User

Viewing Services for a Single User

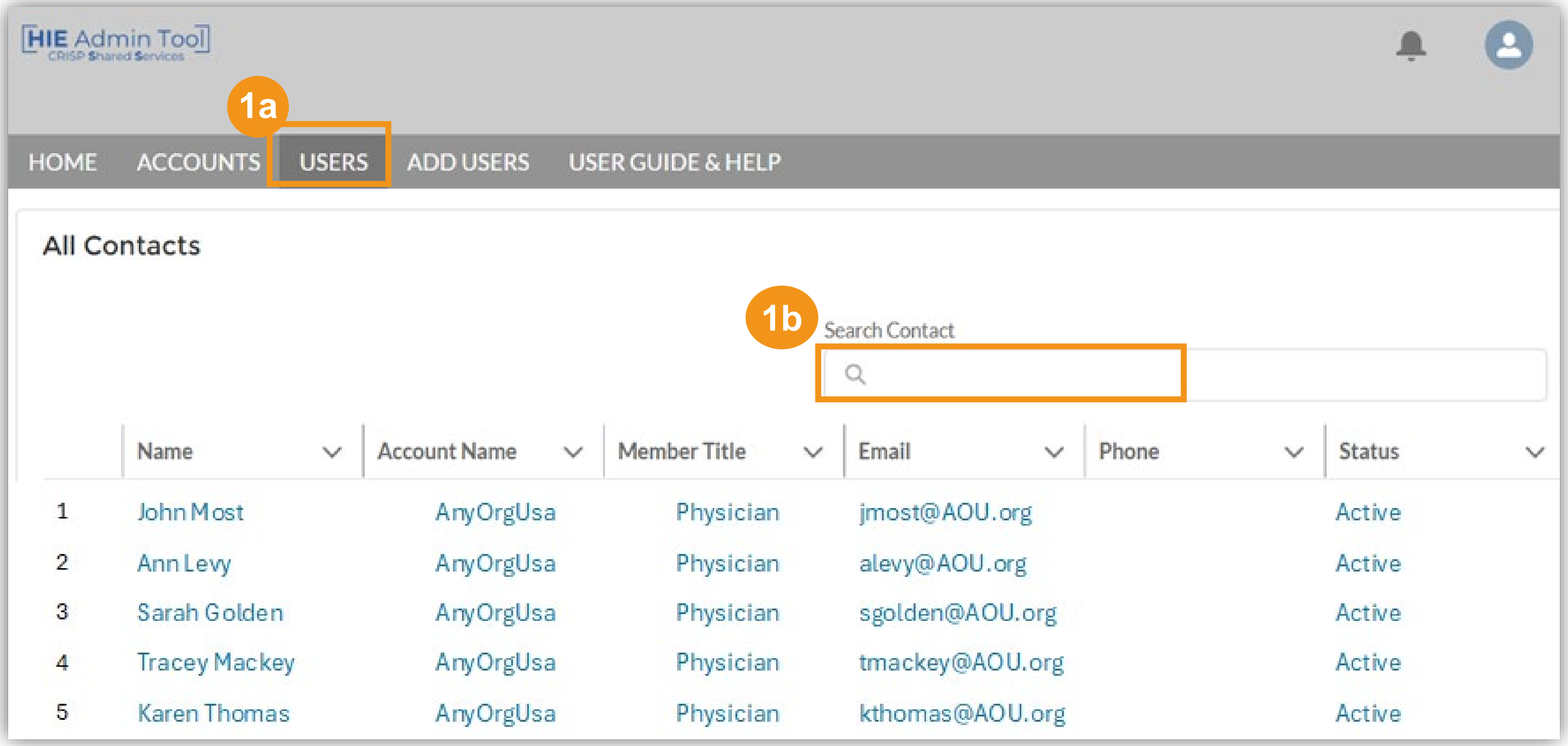
Password or Activation Email Reset

Return to TOC

Editing User Details

1 **Selecting a Contact**

(1a) Go to **Users** tab
(1b) Enter name or email in the search box and click enter



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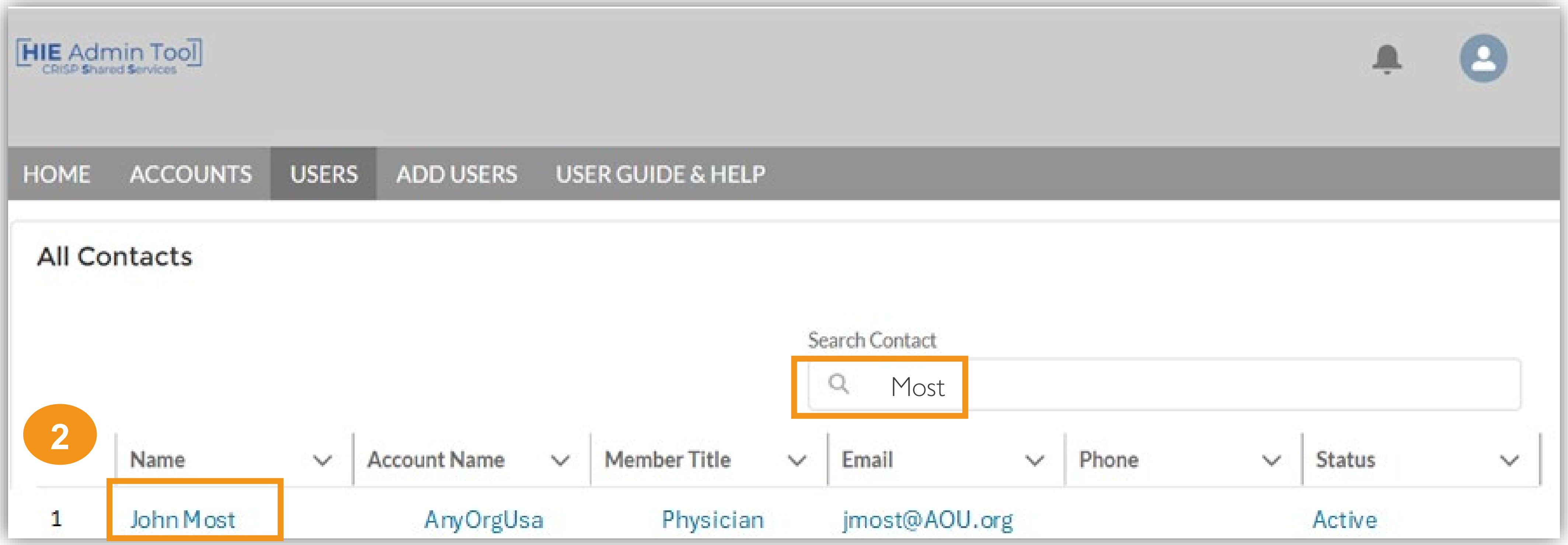
Editing User Details

2 Selecting a Contact

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



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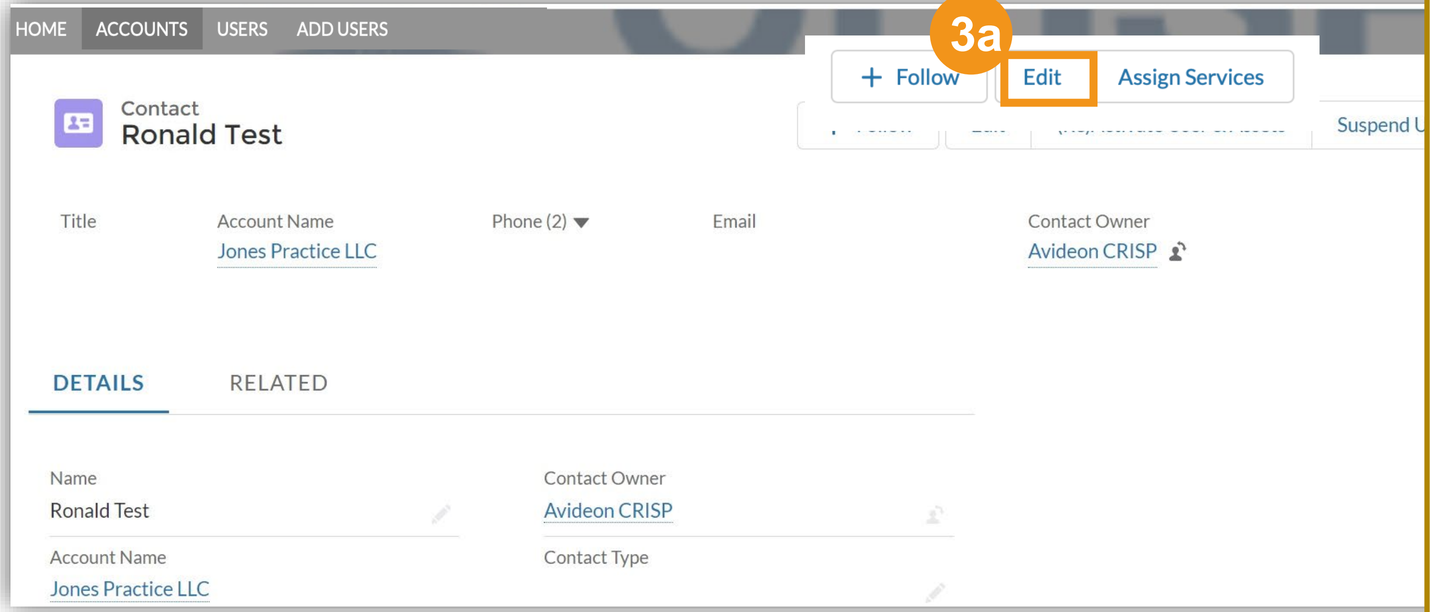
Editing User Details

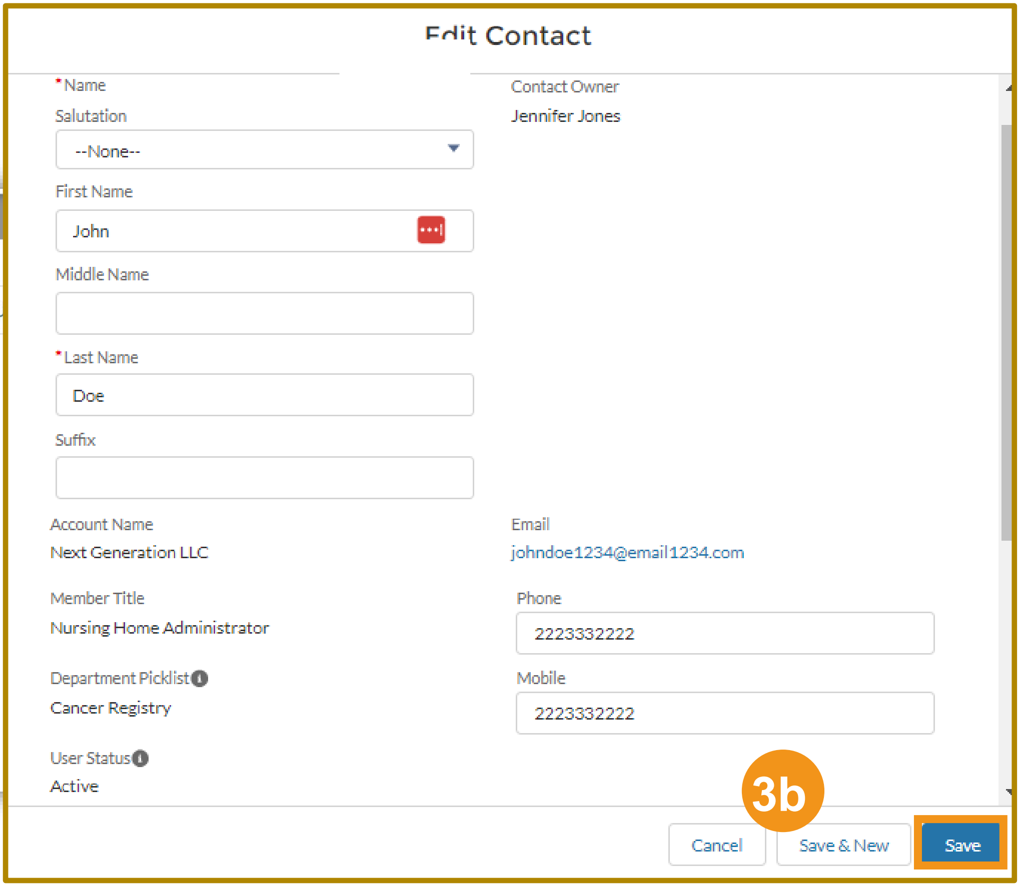
3 Editing and Saving a Contact's Information

(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.





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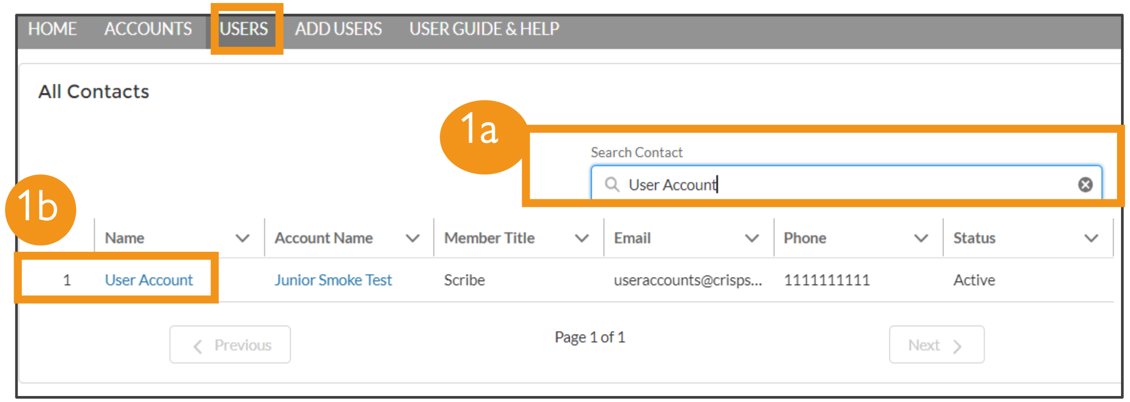
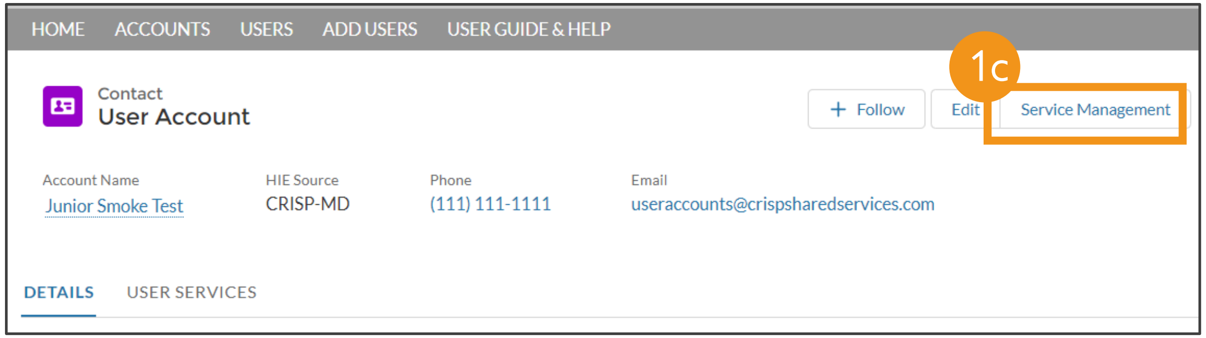
Deactivating Services: Single User

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**





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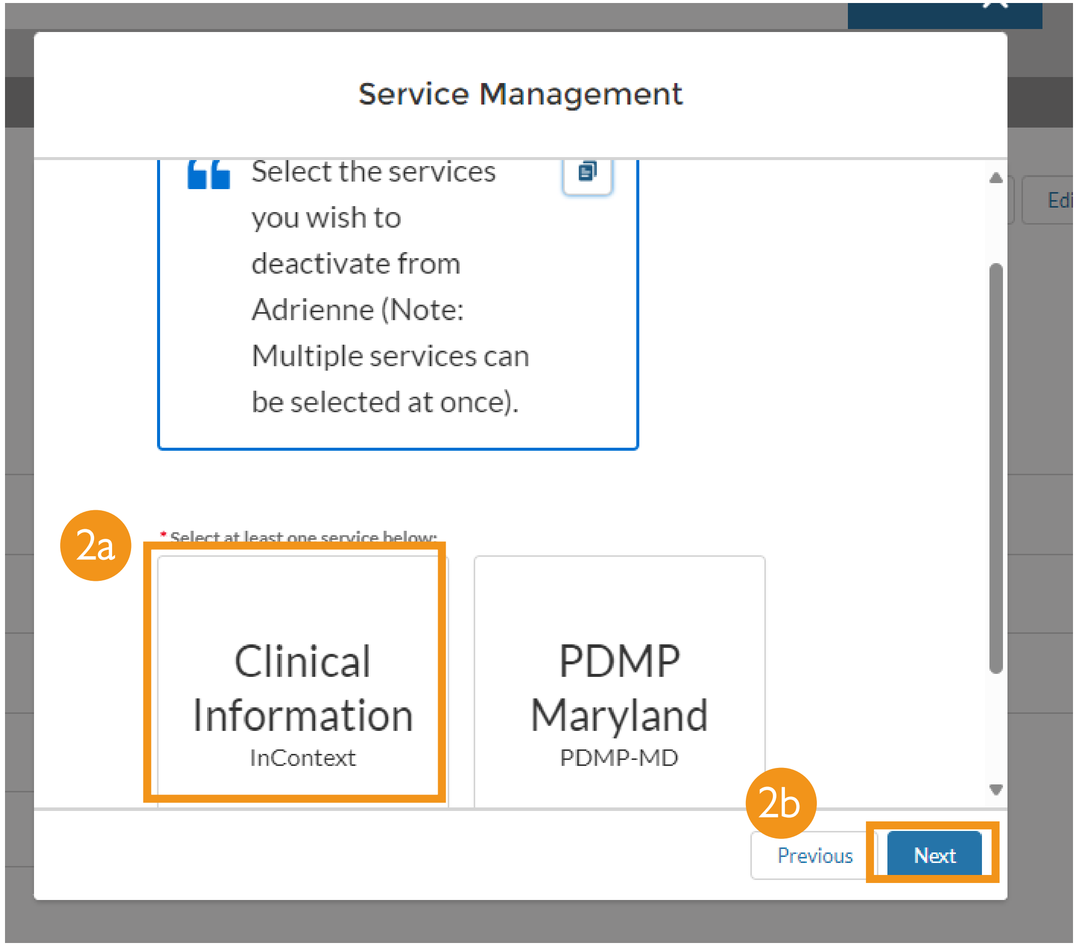
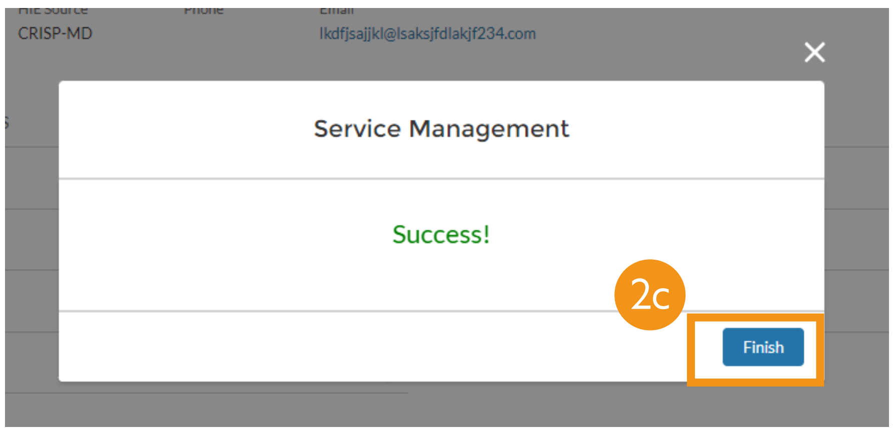
Deactivating Services: Single User

2 Deactivating a service for a single User

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





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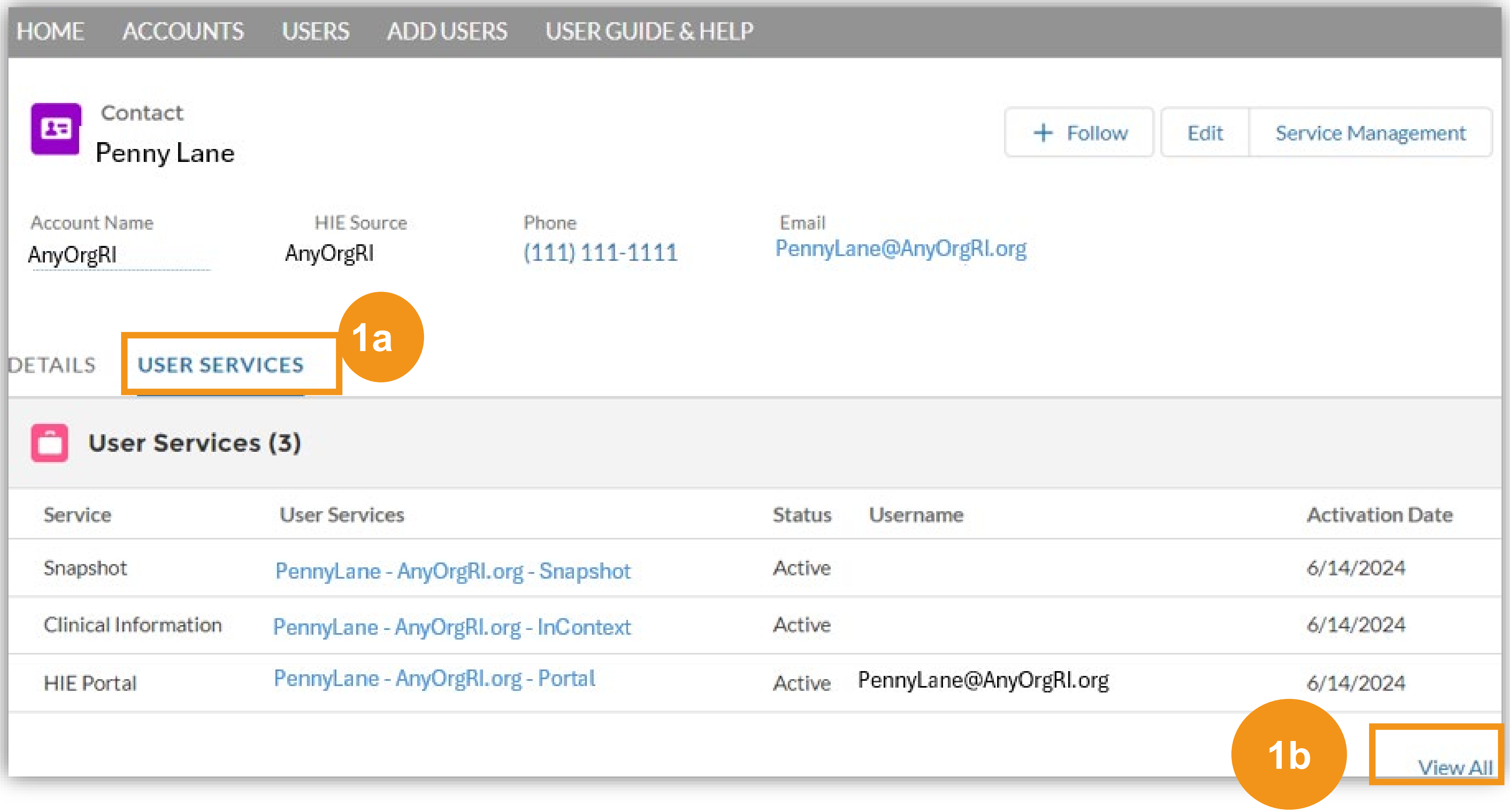
Viewing Services for a Single User

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.



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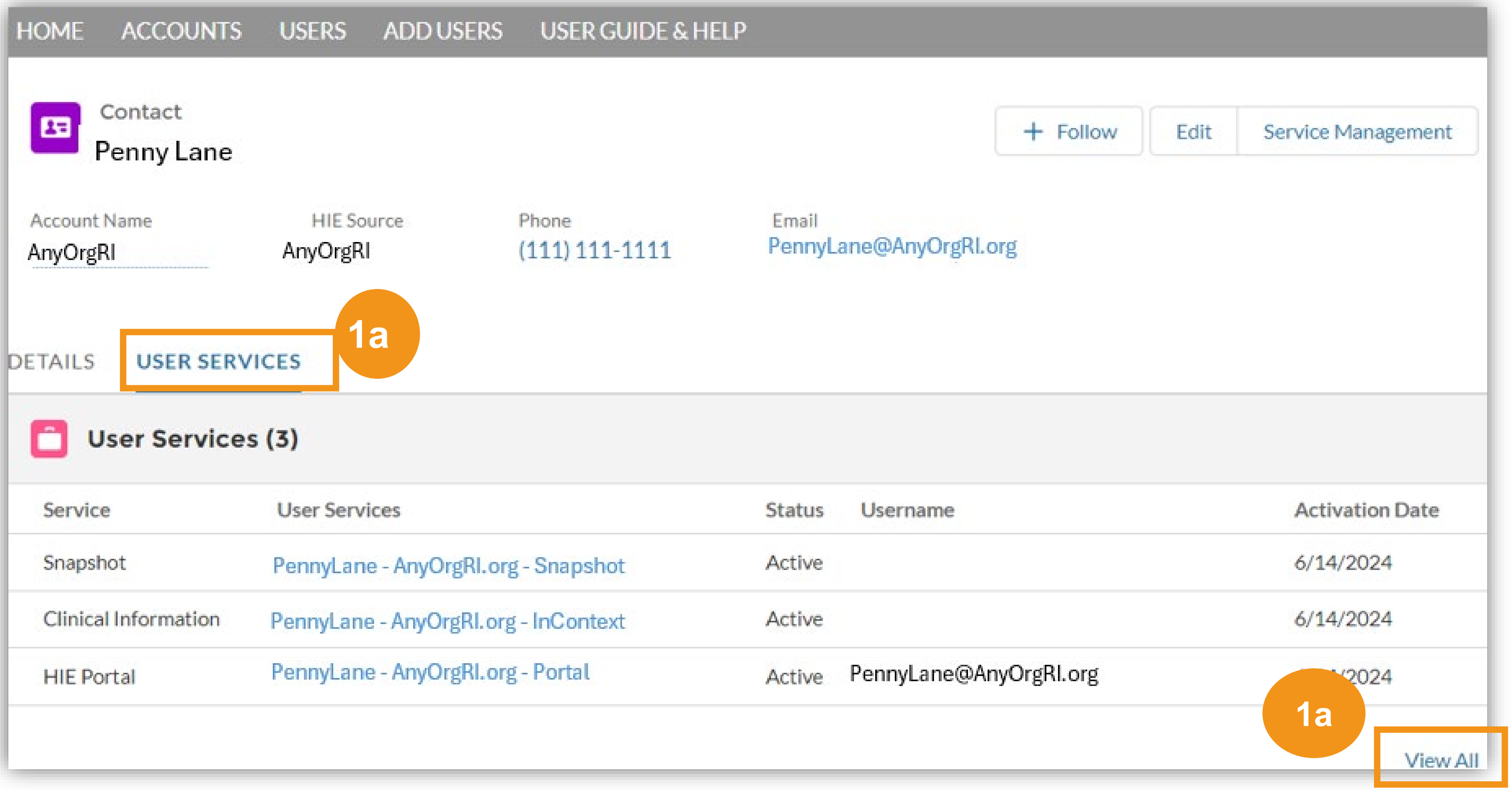
HIE Portal - Password or Activation Email Reset

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



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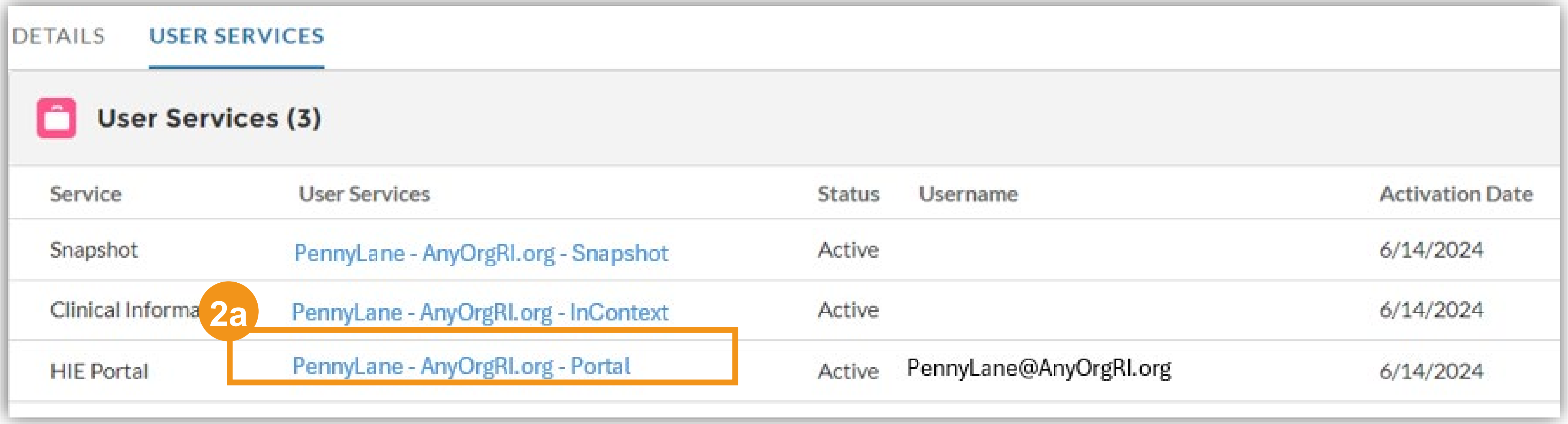
HIE Portal – Password or Activation Email Reset

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

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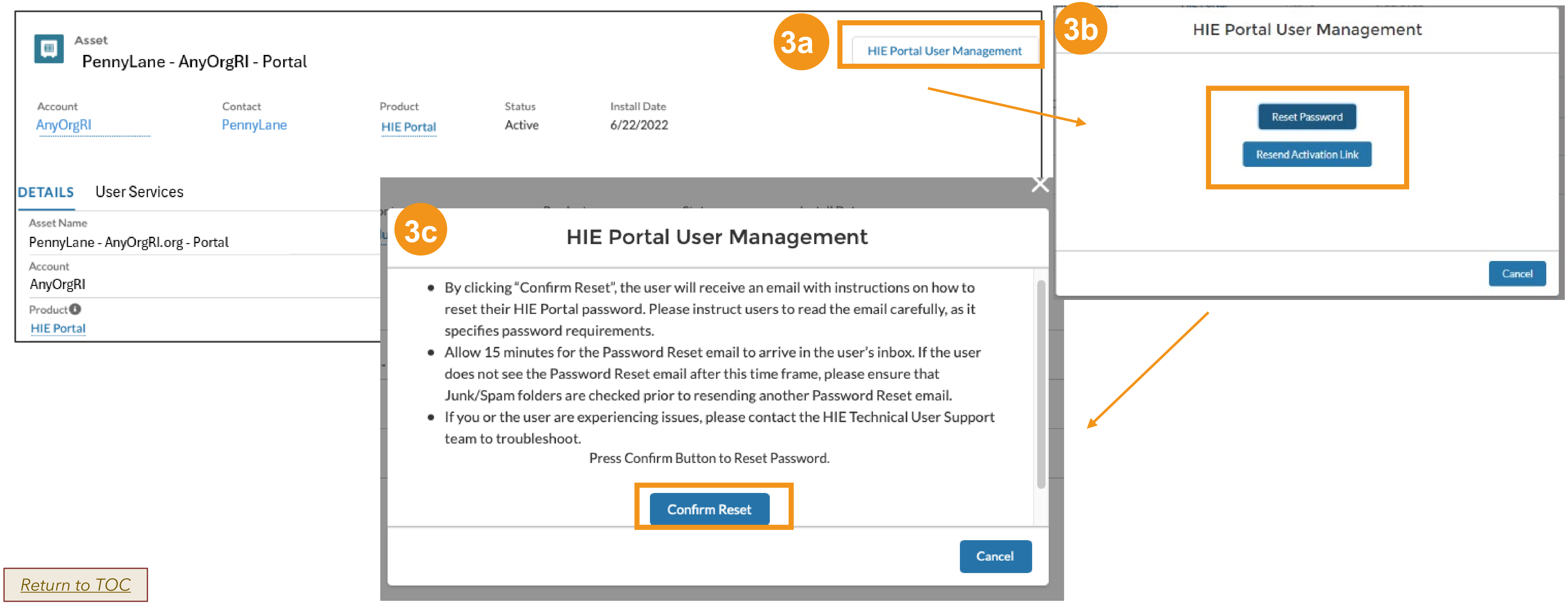
HIE Portal – Password or Activation Email Reset

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**



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Resources

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Learn more at:

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

Contacts

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

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