



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



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

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!***

Adding User Accounts

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



Accessing the HIE Admin Tool

1 Logging In

The screenshot displays the CurrentCare Portal interface. At the top, there is a navigation bar with the CurrentCare logo, copyright information, and links for 'MY HIE ADMIN(S)', 'SEND FEEDBACK', and 'PRODUCT UPDATES'. Below this is a dark blue header with a 'HOME' button and a search bar for applications. The main content area is divided into two sections. On the left is the 'Patient Search' form, which includes input fields for First Name, Last Name, Date of Birth, Gender, and SSN, along with 'Reset' and 'Search' buttons. On the right is the 'Search Results' section, which currently shows 'No records found'. Below the search section is the 'Your Dashboard' area, which contains five tiles: 'HIE Admin Tool', 'Panel Processor', 'CRI - Troubleshooting', 'Panel Processor - Dev', and 'User Guide & Help'. The 'HIE Admin Tool' tile is highlighted with a red circle and the number 1.

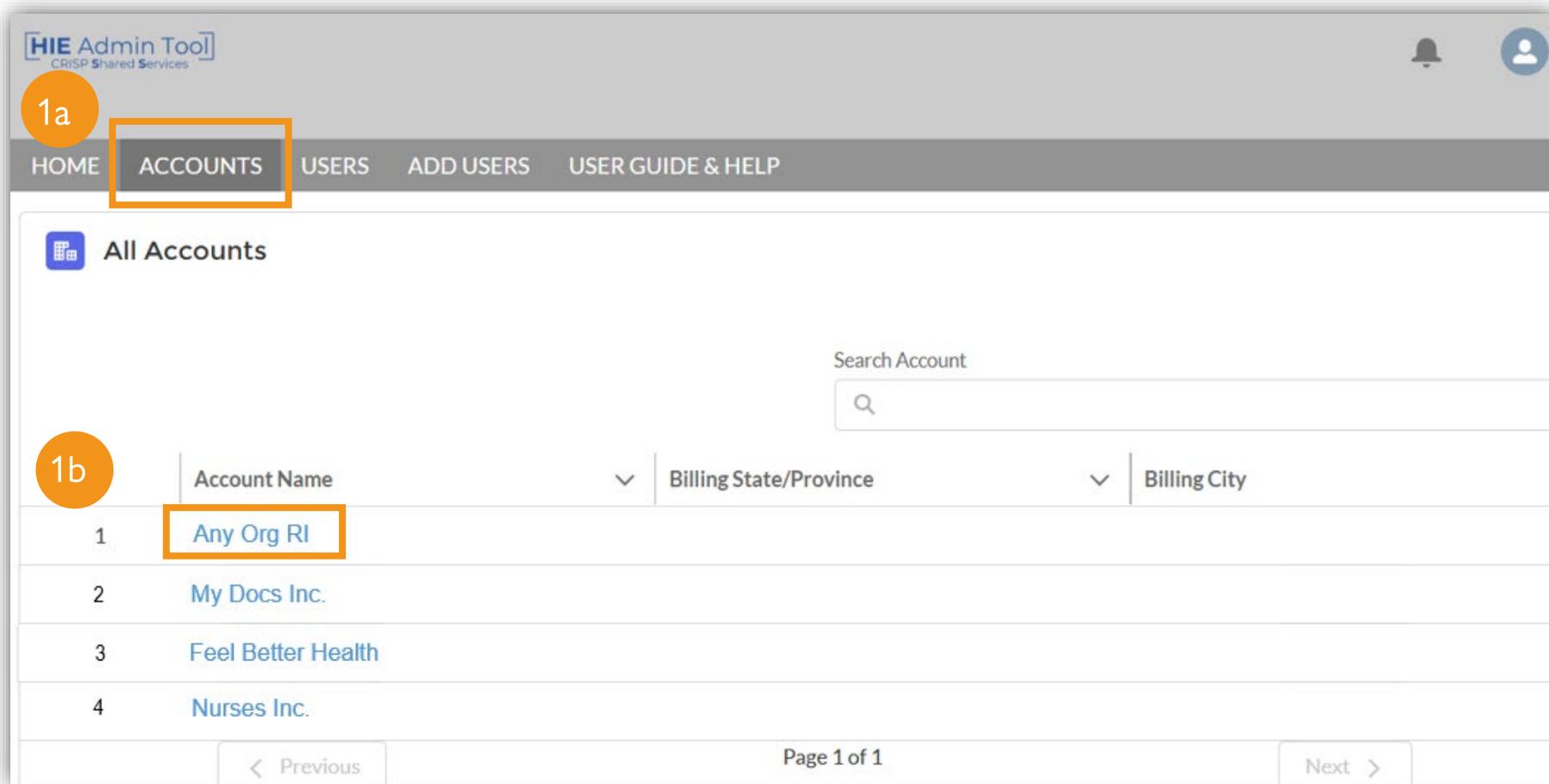
1 Log into your **CurrentCare Portal** account and click the **HIE Admin Tool** tile.

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.



The screenshot shows the HIE Admin Tool interface. The top navigation bar includes 'HOME', 'ACCOUNTS' (highlighted with an orange box and labeled '1a'), 'USERS', 'ADD USERS', and 'USER GUIDE & HELP'. Below the navigation bar, the 'All Accounts' section is visible, featuring a search bar labeled 'Search Account'. A table lists accounts with columns for 'Account Name', 'Billing State/Province', and 'Billing City'. The first row, 'Any Org RI', is highlighted with an orange box and labeled '1b'. The table also includes a '1' in the first column for each row. The bottom of the page shows 'Page 1 of 1' and navigation buttons for 'Previous' and 'Next'.

	Account Name	Billing State/Province	Billing City
1	Any Org RI		
2	My Docs Inc.		
3	Feel Better Health		
4	Nurses Inc.		

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

The screenshot shows a web interface for adding users. At the top, there is a navigation bar with tabs: HOME, ACCOUNTS, USERS, and ADD USERS. The 'ADD USERS' tab is highlighted with an orange box and labeled '1a'. Below the navigation bar, there are two tabs: 'Single User' and 'Bulk User'. The 'Single User' tab is selected and highlighted with an orange box and labeled '1b'. Below the tabs, there is a form with a red border. The form has a label '*Title' and a dropdown menu showing '-None-'. The dropdown menu is open, showing a list of titles: '-None-', 'Cancer Registrar', 'Certified Nurse Midwife', 'Clinical Pharmacist', 'Dentist', 'Licensed Clinical Social Worker', 'LTC Consultant Pharmacist', 'Medical Assistant', and 'Nurse Practitioner'. The '-None-' option is selected and highlighted with a blue bar. Below the dropdown menu, there is a red error message: 'Complete this field.' At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with an orange box and labeled '1c'.

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

HOME
ACCOUNTS
USERS
ADD USERS

Bulk User
Unprocessed Users

* Title

* Organization

* User Type

Complete this field.

* First Name

* Last Name

* Email →

* Department

State License

Submit
Cancel

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

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.

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.

3a Submit Cancel

3b Confirm Cancel

3c Success
New User created successfully!

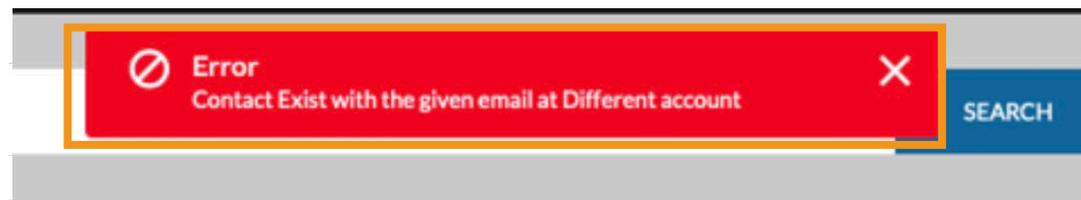
Adding Individual Users

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

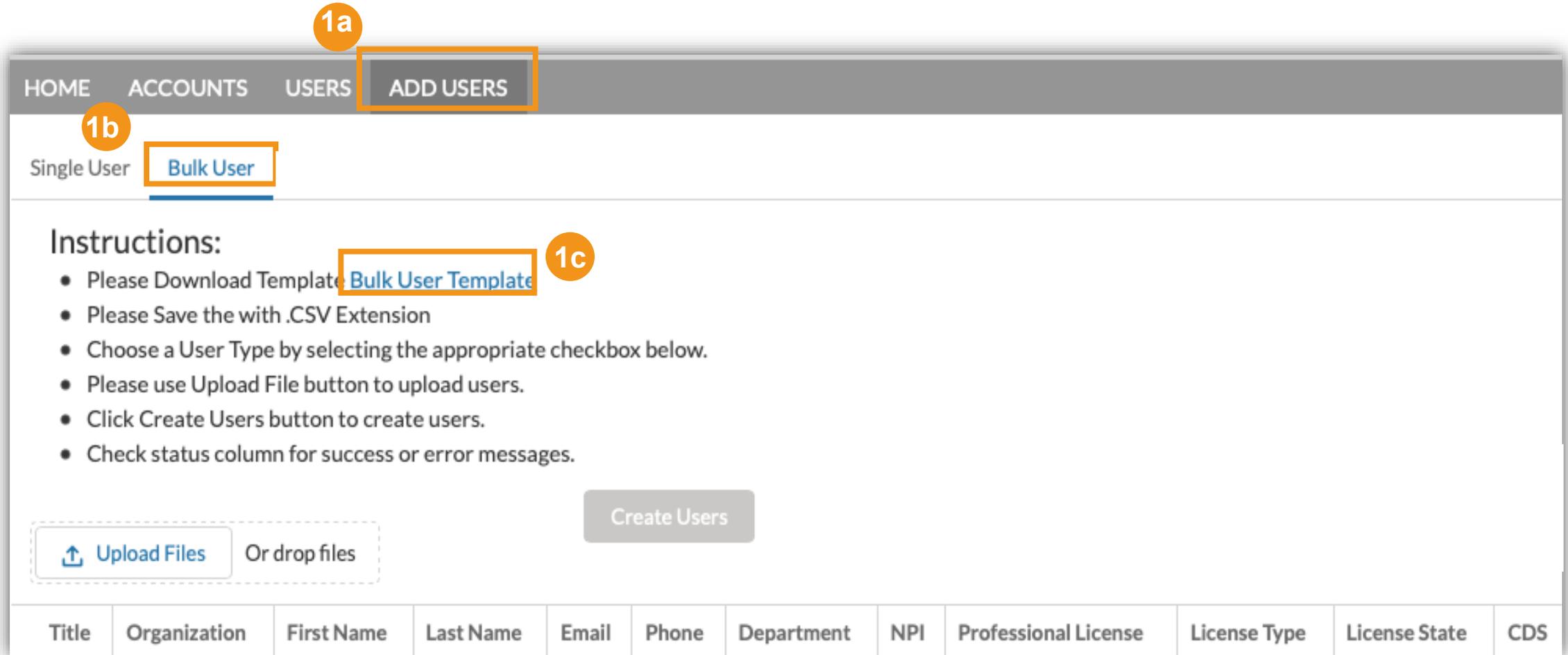
- This could be at an account you manage or another account within the system.
 - *Go to the Users tab and use the search feature to see if this user already exists in the system.*
 - *If you do not see the user listed, contact Technical User Support.*



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.



The screenshot shows a web application interface for adding users. At the top, there is a navigation bar with tabs: HOME, ACCOUNTS, USERS, and ADD USERS. The 'ADD USERS' tab is highlighted with a callout '1a'. Below the navigation bar, there are two tabs: 'Single User' and 'Bulk User'. The 'Bulk User' tab is highlighted with a callout '1b'. Under the 'Bulk User' tab, there is an 'Instructions:' section. The first bullet point in the instructions is 'Please Download Template [Bulk User Template](#)', where the link is highlighted with a callout '1c'. Below the instructions, there is a 'Create Users' button. At the bottom left, there is an 'Upload Files' button with an upward arrow icon and the text 'Or drop files'. At the bottom of the page, there is a table with the following columns: Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License, License Type, License State, and CDS.

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.

We've opened your file for quick and easy viewing right in Microsoft Edge. Choose Download file if you want to use it later. [Download file](#)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Member Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Type	State License	CDS	DEA
2	Cancer Registrar	Required	Required	Required	Required	Required	Required	NA	NA	NA	NA	NA	NA
3	Certified Nurse Midwife	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable	Required	Applicable	Applicable
4	Clinical Pharmacist	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
5	Dentist	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
6	Licensed Clinical Social Worker	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
7	LTC Consultant Pharmacist	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
8	Medical Assistant	Required	Required	Required	Required	Required	Required	NA	NA	NA	NA	NA	NA
9	Nurse Practitioner	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Applicable	Applicable
10	Nursing Home Administrator	Required	Required	Required	Required	Required	Required	NA	NA	NA	NA	NA	NA
11	Nursing Home Other Staff	Required	Required	Required	Required	Required	Required	NA	NA	NA	NA	NA	NA

User List **Required Fields by Title** Picklist +

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

2a

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

2b

Search for tools, help, and more (Alt + Q)

File Home Insert Share Page Layout Formulas Data Review View Help Draw

12 B [Icons] General \$€

D3 X ✓ fx

	A	B	C	D	E	F	G	H	I	J
1	Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Ty
2										
3										

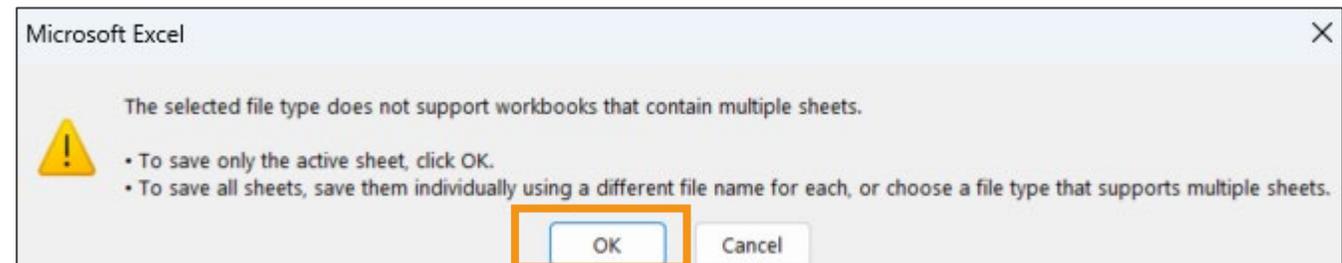
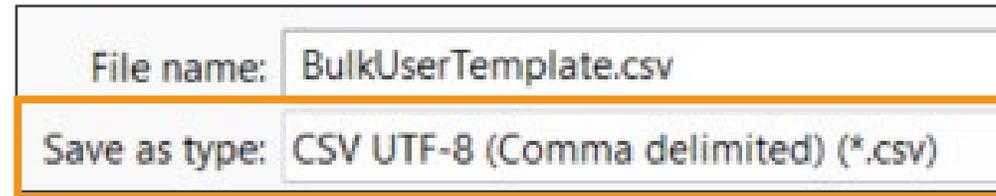
Adding Multiple Users

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.



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.*

The screenshot shows a web application interface for adding users. At the top, there is a navigation bar with 'HOME', 'ACCOUNTS', 'USERS', and 'ADD USERS'. Below this, there are tabs for 'Single User', 'Bulk User', and 'Unprocessed Users'. The 'Bulk User' tab is selected. The main content area contains 'Instructions:' followed by a list of steps:

- Please Download Template [Bulk User Template](#)
- Please Save the with .CSV Extension
- Choose a User Type by selecting the appropriate checkbox below.
- Please use Upload File button to upload users.
- Click Create Users button to create users.
- Check status column for success or error messages.

 Below the instructions, there is a 'Create Users' button and a checkbox for 'Portal (AK, CT, WV)' which is checked. A callout box labeled '4a' points to the 'Upload Files' button, which is highlighted with an orange border. Below the instructions and buttons is a table with the following columns: Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License, License Type, License State, and CDS.

Adding Multiple Users

5 Creating Users

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

Single User **Bulk User** Unprocessed Users

Instructions:

- Please Download Template [Bulk User Template](#)
- Please Save the with .CSV Extension
- Choose a User Type by selecting the appropriate checkbox below.
- 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

Template users. or messages.

Portal

5a **Create Users**

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

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

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 login credentials with another individual.

Confirm
Cancel

Message

1 successfully created
 0 failed Records

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.*

HOME ACCOUNTS USERS ADD USERS

Single User Bulk User Unprocessed Users

Instructions:

- Please Download Template [Bulk User Template](#)
- Please Save the with .CSV Extension
- Choose a User Type by selecting the appropriate checkbox below.
- 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

Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Type	License State	CDS	DEA	Status
Reprocess Users													
Error Message	Title	Organization	First Name	Last Name	PDMP Specialty								
Please Provide Valide NPI	Physician	Junior Smoke Test	Yello70	Clouds70									

Assigning Services

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



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

The screenshot displays the Current Care web application interface. At the top, there is a navigation bar with the Current Care logo, copyright information, and user options like 'MY HIE ADMIN(S)', 'SEND FEEDBACK', 'PRODUCT UPDATES', 'MARGARET MENNA', and 'LOGOUT'. Below this is a search bar for 'Applications & Reports'. The main content area is divided into a search form on the left and a dashboard on the right. The search form includes fields for 'First Name', 'Last Name', 'Date of Birth', 'Gender', 'Address', and 'SSN', with a 'Search' button. The dashboard, titled 'Your Dashboard', contains several service tiles: 'Clinical Information Test', 'Clinical Information Demo', 'HIE Admin Tool', 'InContext Dev', 'Panel Processor', 'CRI - Troubleshooting', 'Panel Processor - Dev', and 'User Guide & Help'. A sidebar on the right shows a 'Population Explorer' panel with a 'Download' button and a message 'No notifications for this panel.'.

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

Assigning Services: Multiple Users

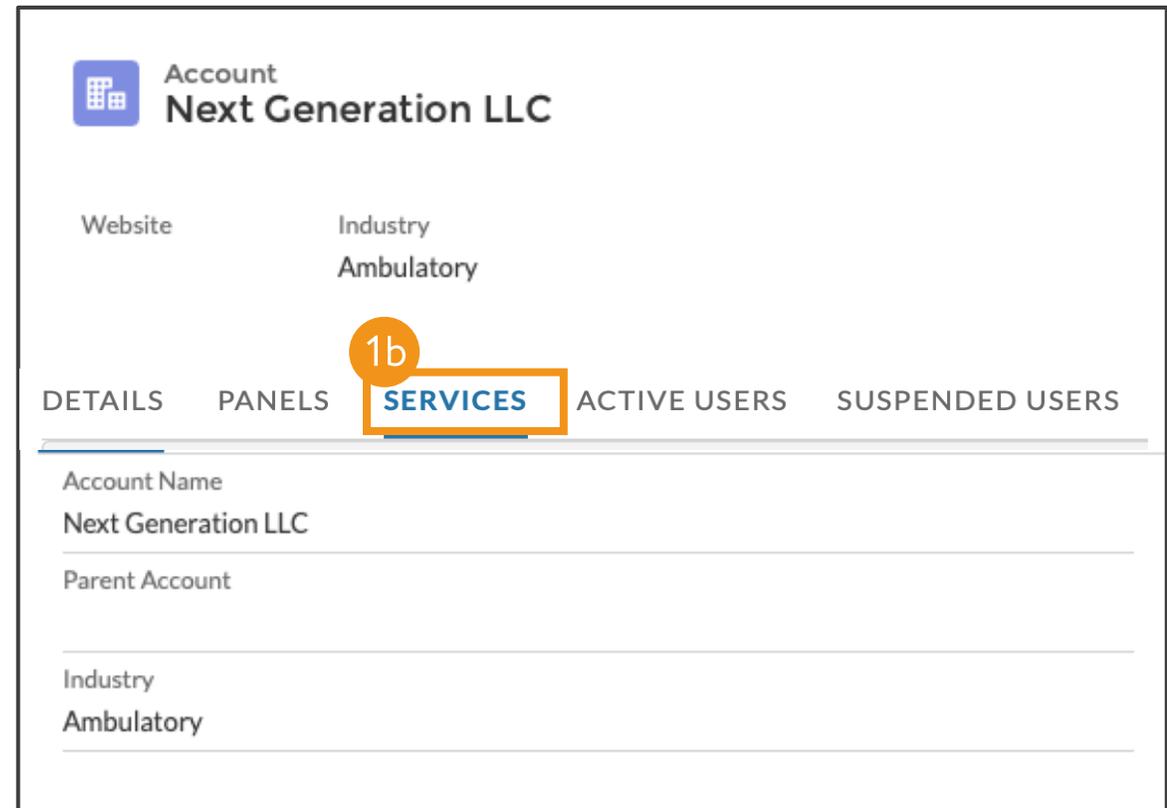
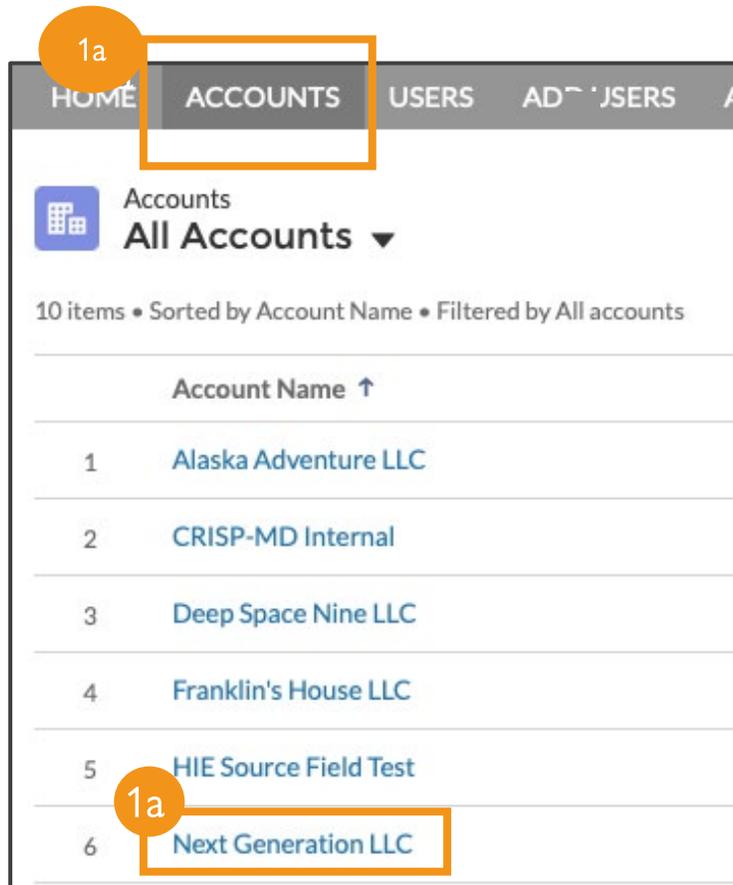
1 Provisioning a service for Multiple Users

(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



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**

Account
Next Generation LLC

Website Industry
Ambulatory

DETAILS PANELS **SERVICES** ACTIVE USERS SUSPENDED USERS

Services	Org Service	Status
HIE Portal	Next Generation LLC - Portal	Active
Clinical Information	Next Generation LLC - InContext	Active
Referrals	Next Generation LLC - ReferralUI	Active
Prescriber Reports	Next Generation LLC - PrescriberReports	Active
COVID-19 Lab Tools	Next Generation LLC - COVIDLabTools	Active
Snapshot	Next Generation LLC - Snapshot	Active
Clinical	Next Generation LLC - Clinical	Active
Unified Landing Page (ULP)	Next Generation LLC - ULP	Active
Encounter Notification System (ENS)	Next Generation LLC - ENS	Active

Asset
Next Generation LLC - Snapshot

Account Contact Product Status Install Date
[Next Generation LLC](#) [Snapshot](#) Active 1/11/2022

DETAILS RELATED

Asset Name	Next Generation LLC - Snapshot	Status	Active
Account	Next Generation LLC	Install Date	1/11/2022
Usage End Date		Deactivation Reason	

Service Management

*Select Service Choices

[Assign Services](#)

[Deactivate Services](#)

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**

Assign Service

Assign Snapshot Service

✓
Select Users
Confirm Selections
Complete!

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.

				Name	Email
1	<input type="checkbox"/>			Aalnerer1 chestington1	aalnerer1chestingt...
2	<input checked="" type="checkbox"/>			Aalnerer10 chestingto...	aalnerer10chestingt...
3	<input type="checkbox"/>			Aalnerer100 chestingt...	aalnerer100chestingt...
4	<input checked="" type="checkbox"/>			Aalnerer101 chestingt...	aalnerer101chestingt...

Page 1 of 10.
< >

Showing 1 to 50 of 488 records.

3b Confirm Selections

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**

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
Complete!

Assign Service

Assign Snapshot Service

Select Access
✓
✓
Complete!

Success!

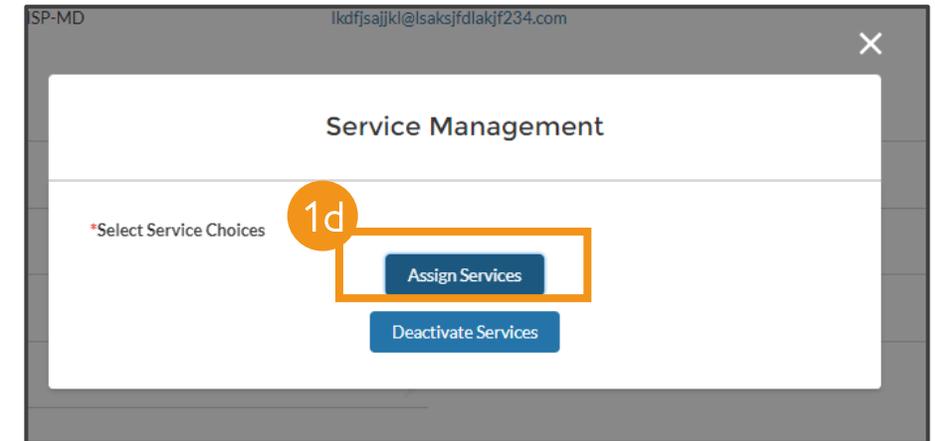
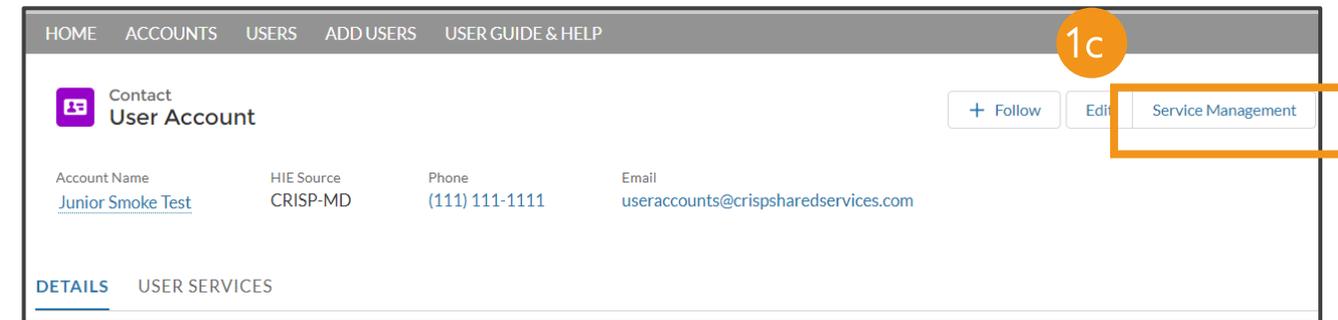
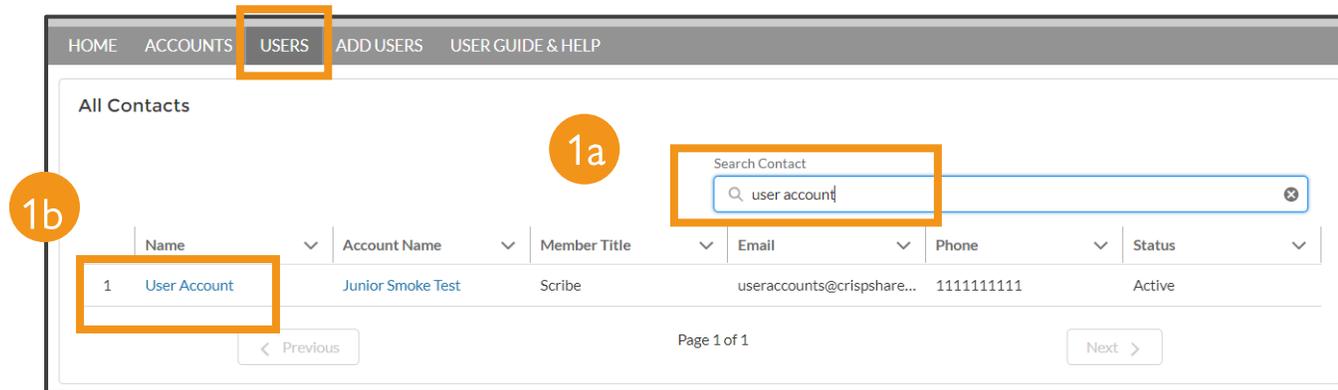
Finish

[Return to](#)

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**



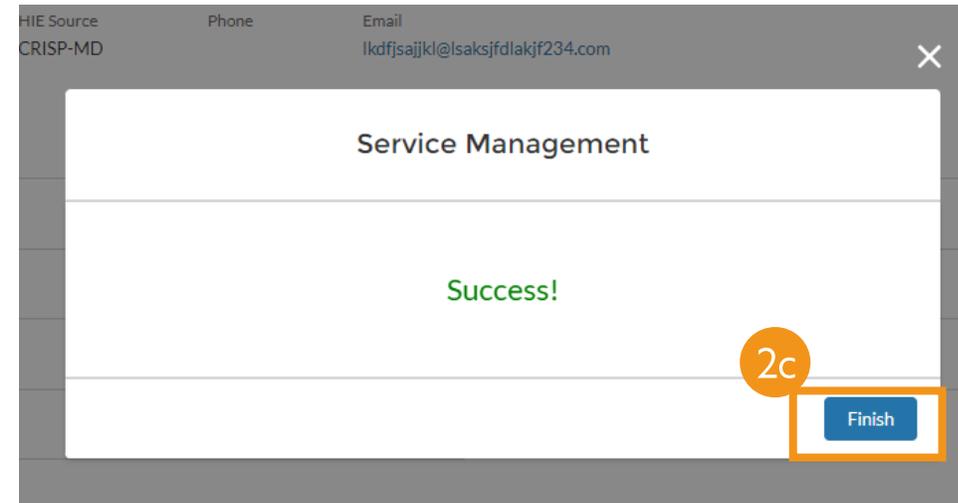
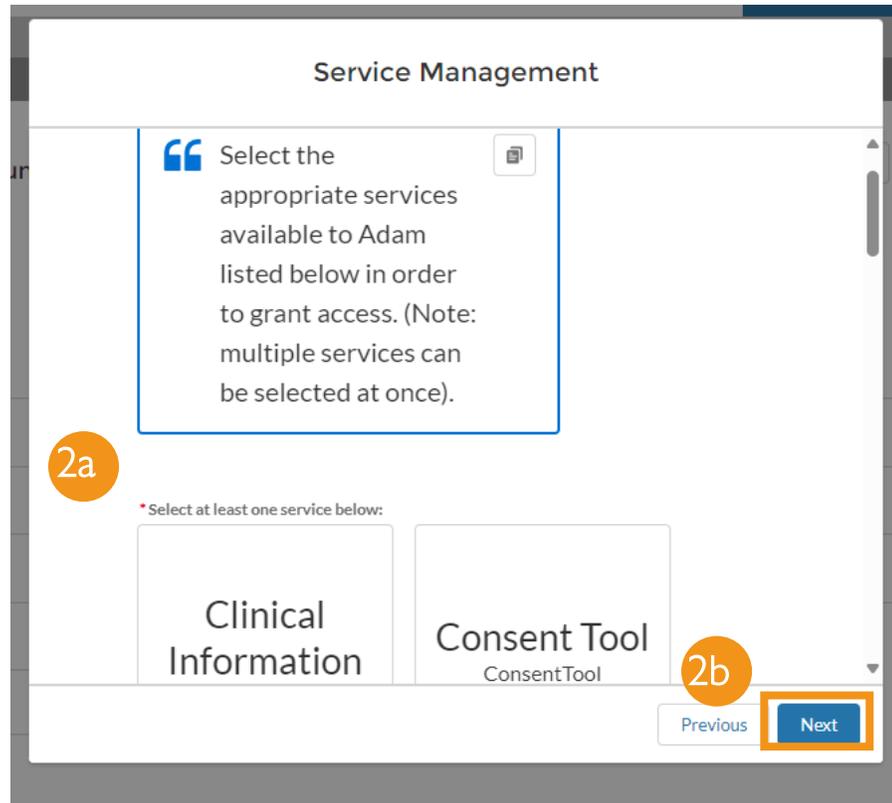
Assigning Services: Single User

2 Assign Services

(2a) Select the service you wish to assign to the user

(2b) Click **Next**

(2c) Click **Finish**



User Audits

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



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*

[Return to TOC](#)

Sandbox: HIE Admin Monthly Audit Reminder



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

To Penny Lane

Wed 10/16/2024 11:35 AM

Follow up. Start by Wednesday, October 16, 2024. Due by Wednesday, October 16, 2024.

Hello,

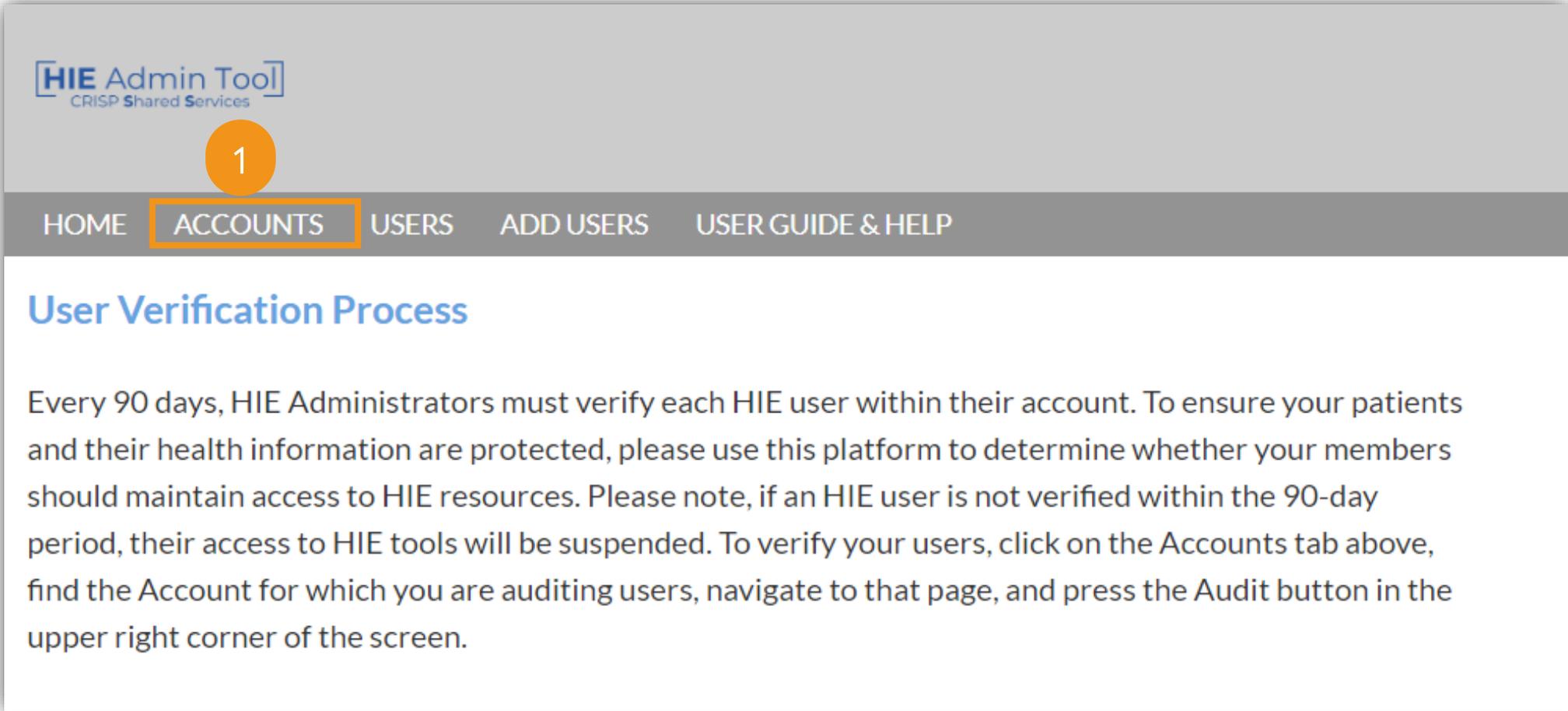
This is a monthly reminder that you are the HIE Administrator for your organization.

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.

User Audits

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



The screenshot shows the HIE Admin Tool interface. At the top left, the logo reads "HIE Admin Tool" with "CRISP Shared Services" underneath. A navigation bar contains the following tabs: HOME, ACCOUNTS, USERS, ADD USERS, and USER GUIDE & HELP. The "ACCOUNTS" tab is highlighted with an orange border and a small orange circle containing the number "1" above it. Below the navigation bar, the main content area has a blue heading "User Verification Process". The text below the heading reads: "Every 90 days, HIE Administrators must verify each HIE user within their account. To ensure your patients and their health information are protected, please use this platform to determine whether your members 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. To verify your users, click on the Accounts tab above, find the Account for which you are auditing users, navigate to that page, and press the Audit button in the upper right corner of the screen."

User Audits - Select an Account

1 Select an Account

(1a) In the **Accounts** tab, click the account name 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

HOME ACCOUNTS ASSETS ADD USERS

Accounts
Recently Viewed ▾

2 items • Updated a few seconds ago

Search this list...

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

1b

HOME ACCOUNTS USERS ADD USERS

Account
Jones Practice LLC

+ Follow New Note **Audit**

Phone	Website	Type	Industry	Account Owner
			Ambulatory	Outreach Team

DETAILS RELATED

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**

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.

2a

Active User

Suspended User

2b

Active Users

Approve Current Page

Status	Name	Email	Member Title	Department	Audit Date	Audit By
<div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; font-weight: bold; margin-right: 5px;">2c</div> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; font-weight: bold; display: inline-block;">Approve</div> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; font-weight: bold; display: inline-block; margin-left: 5px;">Deny</div>	HIE AdminEmail	mpartlow@avideon.com				
<div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 50%; padding: 2px 5px; font-weight: bold; margin-right: 5px;">2c</div> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; font-weight: bold; display: inline-block;">App</div> <div style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px; font-weight: bold; display: inline-block; margin-left: 5px;">Deny</div>	Juan Gonzalez					

2d

Complete Audit

Cancel

✓
Success
All records Successfully Updated
✕

User Audits - Active Users

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

HIE Admin - User Confirmation Page

Deactivated Users	
Name	Email
sherlock sherlock	holmes52@asdadas.com

Active Users	
Name	Email
pencil2 eraser2	pencil2eraser2@gkjdsld.com

3

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.

✓ **Success**
 All records Successfully Updated ✕

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.**

The screenshot displays the 'Suspended Users' audit interface. At the top, there are two tabs: 'Active User' and 'Suspended User', with the latter selected and highlighted by callout '3a'. Below the tabs is a table of suspended users. The table has columns for Status, Name, Email, Member Title, Department, Audit Date, and Audit By. Each row has an 'Approve' and 'Deny' button in the Status column. The 'Approve' button for the first user, 'Laughter Ajibade', is highlighted by callout '3b'. At the bottom right of the table, there is a 'Complete Audit' button (highlighted by callout '3c') and a 'Cancel' button. A blue button labeled 'Approve Current Page' is located at the top right of the table area.

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

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

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

Account: Interstellar LLC

Industry: Ambulatory Medical

Buttons: + Follow, **User Export**, New Note, Audit

Tabs: DETAILS, ACTIVE USERS, SUSPENDED USERS, PANELS, SERVICES

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

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
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	

Managing Existing Users

Edit User Details

Deactivating Services for a Single User

Viewing Services for a Single User

Password or Activation Email Reset



Editing User Details

1 Selecting a Contact

(1a) Go to **Users** tab

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

The screenshot shows the 'HIE Admin Tool' interface with the 'USERS' tab selected. A search box labeled 'Search Contact' is highlighted with an orange box and labeled '1b'. Below the search box is a table of contacts with columns for Name, Account Name, Member Title, Email, Phone, and Status. The table contains five rows of contact information.

	Name	Account Name	Member Title	Email	Phone	Status
1	John Most	AnyOrgUsa	Physician	jmost@AOU.org		Active
2	Ann Levy	AnyOrgUsa	Physician	alevy@AOU.org		Active
3	Sarah Golden	AnyOrgUsa	Physician	sgolden@AOU.org		Active
4	Tracey Mackey	AnyOrgUsa	Physician	tmackey@AOU.org		Active
5	Karen Thomas	AnyOrgUsa	Physician	kthomas@AOU.org		Active

Editing User Details

2 Selecting a Contact

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

The screenshot shows the 'HIE Admin Tool' interface with a navigation menu including 'HOME', 'ACCOUNTS', 'USERS', 'ADD USERS', and 'USER GUIDE & HELP'. The 'USERS' tab is active. Below the navigation is a section titled 'All Contacts'. A search bar labeled 'Search Contact' contains the text 'Most'. Below the search bar is a table with the following columns: Name, Account Name, Member Title, Email, Phone, and Status. The first row of the table is highlighted with an orange box, and the name 'John Most' is also highlighted with an orange box. A circled '2' is placed to the left of the table header.

	Name	Account Name	Member Title	Email	Phone	Status
1	John Most	AnyOrgUsa	Physician	jmost@AOU.org		Active

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.

HOME ACCOUNTS USERS ADD USERS

Contact **Ronald Test**

+ Follow **Edit** Assign Services Suspend U

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

DETAILS RELATED

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

Edit Contact

*Name Contact Owner
Jennifer Jones

Salutation --None--

First Name John

Middle Name

*Last Name Doe

Suffix

Account Name Next Generation LLC Email johndoe1234@email1234.com

Member Title Nursing Home Administrator Phone 2223332222

Department Picklist 1 Cancer Registry Mobile 2223332222

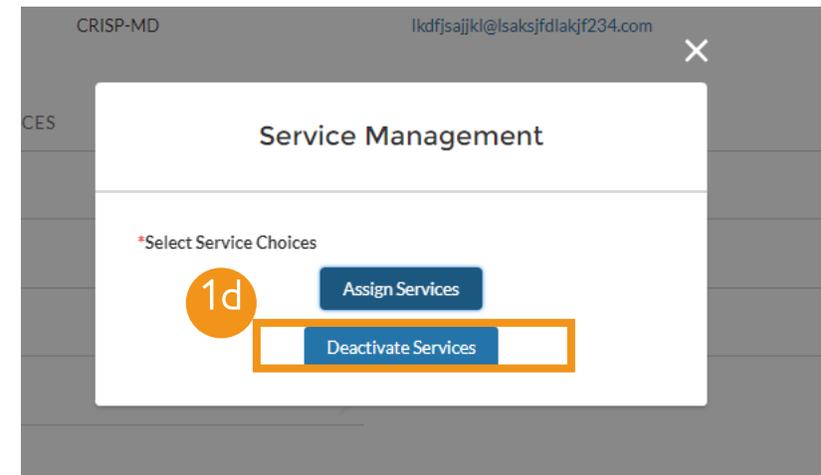
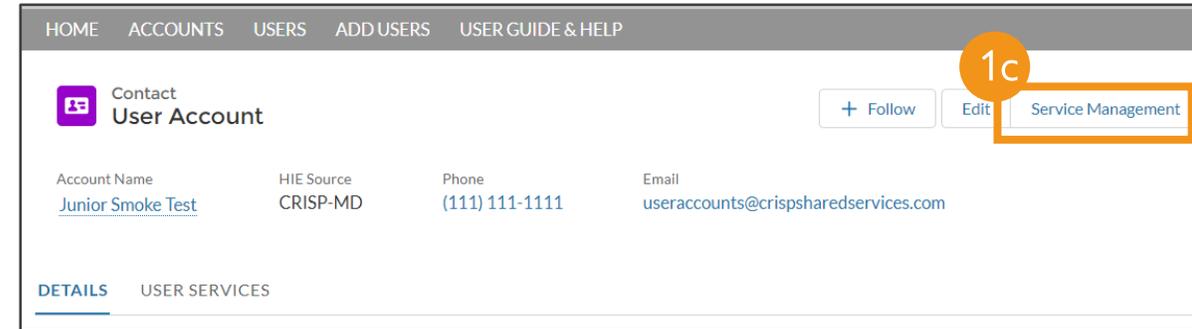
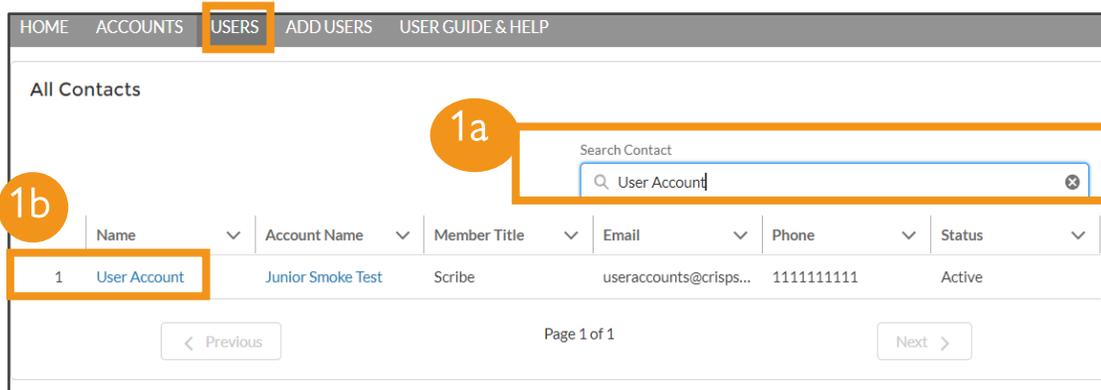
User Status 1 Active

Cancel Save & New **Save**

Deactivating Services: Single User

1 Deactivating a service for a single User

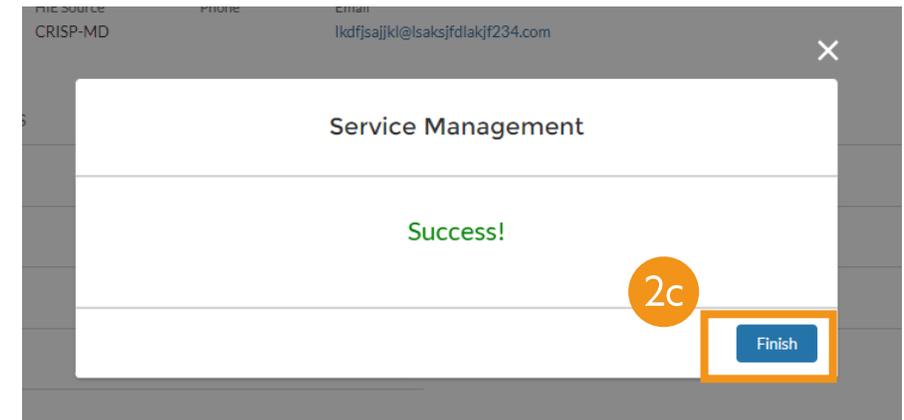
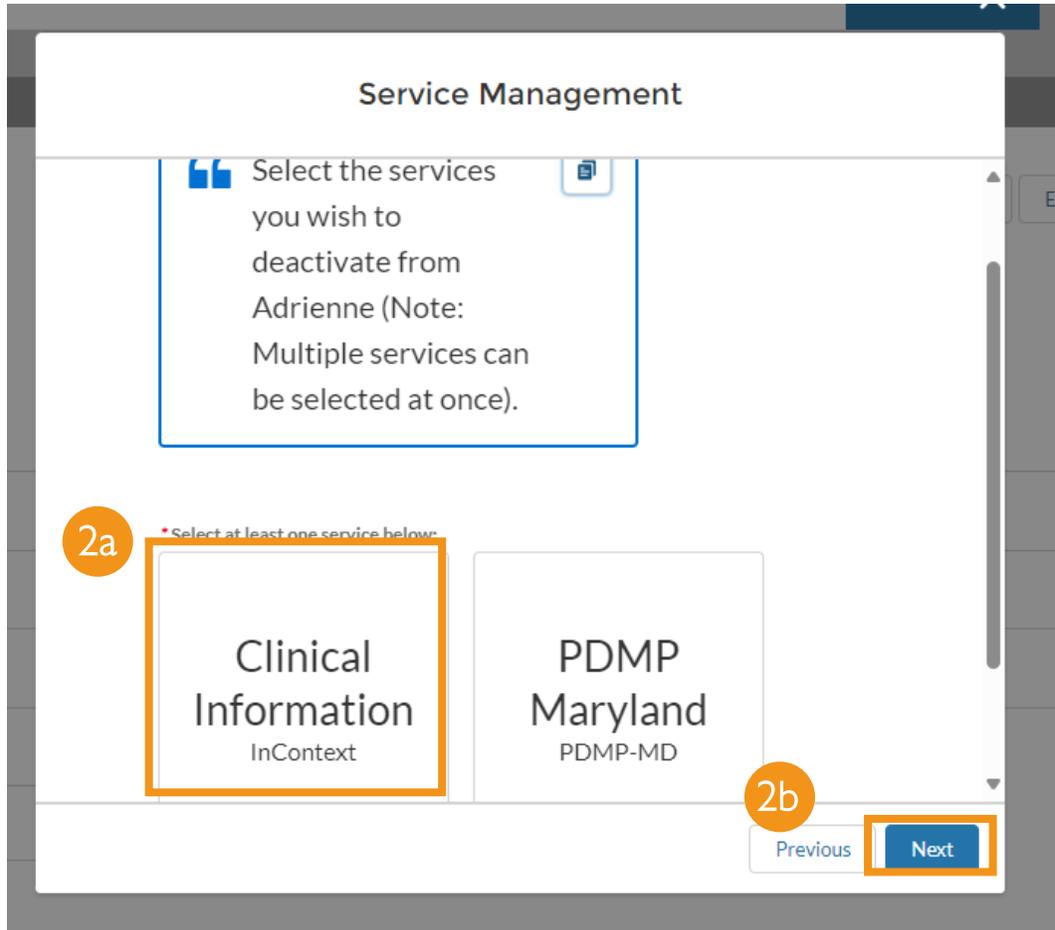
- (1a) Click the **Users** tab and search for the user's name
- (1b) Click on the user's name
- (1c) Click **Service Management**
- (1d) Click **Deactivate Services**



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**



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.

The screenshot shows a user profile for Penny Lane. The navigation bar includes HOME, ACCOUNTS, USERS, ADD USERS, and USER GUIDE & HELP. The user's contact information is displayed, including Account Name (AnyOrgRI), HIE Source (AnyOrgRI), Phone ((111) 111-1111), and Email (PennyLane@AnyOrgRI.org). The 'USER SERVICES' tab is highlighted with an orange box and labeled '1a'. Below the tab, there is a section for 'User Services (3)' with a table listing services. The 'View All' button is highlighted with an orange box and labeled '1b'.

Service	User Services	Status	Username	Activation Date
Snapshot	PennyLane - AnyOrgRI.org - Snapshot	Active		6/14/2024
Clinical Information	PennyLane - AnyOrgRI.org - InContext	Active		6/14/2024
HIE Portal	PennyLane - AnyOrgRI.org - Portal	Active	PennyLane@AnyOrgRI.org	6/14/2024

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

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Contact Penny Lane + Follow Edit Service Management

Account Name: AnyOrgRI | HIE Source: AnyOrgRI | Phone: (111) 111-1111 | Email: PennyLane@AnyOrgRI.org

DETAILS **USER SERVICES** 1a

User Services (3)

Service	User Services	Status	Username	Activation Date
Snapshot	PennyLane - AnyOrgRI.org - Snapshot	Active		6/14/2024
Clinical Information	PennyLane - AnyOrgRI.org - InContext	Active		6/14/2024
HIE Portal	PennyLane - AnyOrgRI.org - Portal	Active	PennyLane@AnyOrgRI.org	6/14/2024

1a **View All**

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

2a

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**

The screenshot displays the HIE Portal User Management interface. On the left, there is a sidebar with 'Asset Name: PennyLane - AnyOrgRI.org - Portal' and 'Product: HIE Portal'. The main area shows a table with columns for Account, Contact, Product, Status, and Install Date. A pop-up window titled 'HIE Portal User Management' is open, containing instructions for resetting a password and a 'Confirm Reset' button. A second pop-up window is also visible, showing 'Reset Password' and 'Resend Activation Link' buttons.

Account	Contact	Product	Status	Install Date
AnyOrgRI	PennyLane	HIE Portal	Active	6/22/2022

3a HIE Portal User Management

3b HIE Portal User Management

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

Resources



Learn more at:

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

Contacts

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

