

HIE Admin Tool

Revision History		
Version Number	Date	Summary of Change
1.0	January 2026	Initial Version

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Introduction and Overview

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 866-554-7255.

Admin Responsibilities

- 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.

Key Terms and Definitions

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

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.

User Suspension: When a user account is suspended, the user will receive an automated suspension email. This notification includes the name and email address of the designated HIE Administrator to contact for restoration of access.

Account Restoration: If a suspended user account is restored, the user will receive an automated restoration email confirming access has been reinstated.

Administrator Audits: HIE Administrators receive a monthly reminder to review and audit user accounts to ensure access remains appropriate. *(Note: audit cadence and process may be updated.)*

New User Provisioning: Newly added users receive a credentialing email with instructions to activate their account. Users must log in within 72 hours of receipt to complete account setup.

Credential Reissue and Password Reset: HIE Administrators may reissue credentials or initiate password resets as needed. New credentials may only be reissued if the user has not previously logged into the account.

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

Accessing the Tool

First-time 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.

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. (See 1a in diagram below)

WELCOME!

User Verification Process

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.

HOME
ACCOUNTS
USERS
ADD USERS
USER GUIDE & HELP

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

HOME
ACCOUNTS
USERS
ADD USERS
USER GUIDE & HELP

Select Account

Please select accounts below you would like to audit. After you are finished selecting press 'Submit' to confirm your selections.

☐ Account Name

☐ CRISP Internal Users - No Break Glass DC

☐ CRISP DEMO

☐ Johns Hopkins Health System

☐ MD Family Reunification

☐ DC Family Reunification

☐ CRISP Internal Users - Break Glass

☐ CRISP Internal Users - No Break Glass

☐ WVHIN Internal Users

- Click 'Submit' to confirm your selections.
- Confirm account selection and click 'Submit.'

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

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

HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Select Account

Please select accounts below you would like to audit. After you are finished selecting press 'Submit' to confirm your selections.

☐ Account Name

☐ CRISP Internal Users - No Break Glass DC

☐ CRISP DEMO

☐ Johns Hopkins Health System

☐ MD Family Reunification

☐ DC Family Reunification

☐ CRISP Internal Users - Break Glass

☐ CRISP Internal Users - No Break Glass

☐ WVHIN Internal Users

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.

[Active Users](#)
[Suspended Users](#)

Active Users

Approve Current Page

Status	First Name	Last Name	Email	Account N...	Member TL...	Department	Audit Date	Audit By
Approve Deny								
Approve Deny								

7. Confirm account selection and click 'Submit.'

All Accounts

Audit Accounts

	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

Parent Account

Phone

Website

Managing Existing 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.

Managing Active Users

- To work with Active Users, ensure the *Active User* tab is selected
- 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
- Select Deny to revoke access for individuals who are no longer employees within your organization

- 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 B
2b Approve Deny	HIE AdminEmail	mpartlow@avideon.com				
Approve 2c Deny	Juan Gonzalez					

2b Approve Current Page

2d Complete Audit Cancel

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.

3a

Active User Suspended User

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

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@asdadas.com

Active Users	
Name	Email
pencil2 eraser2	pencil2eraser2@gkjdsiafd.com

Previous Finish

Success
All records Successfully Updated

Creating Individual Users vs. Creating New Users

For creating a new user see below. To create an individual user, skip to page 14.

Selecting a Title

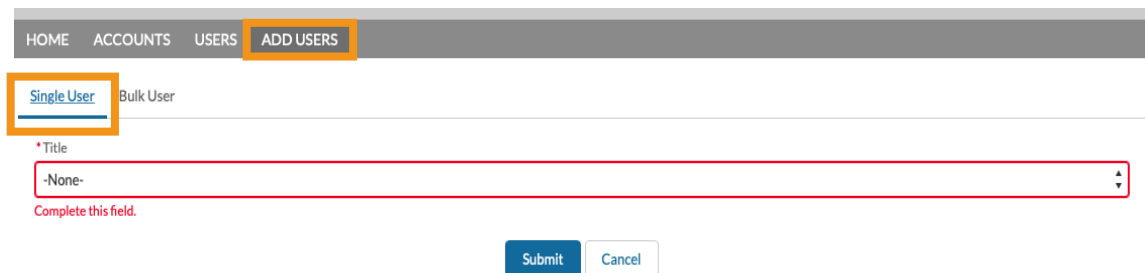
(1a) To provide access to HIE tools, click the *Add Users* tab at the top of the home screen

(1b) Ensure "Single User" is underlined

(1c) Select applicable Title from drop-down list

1a

1b



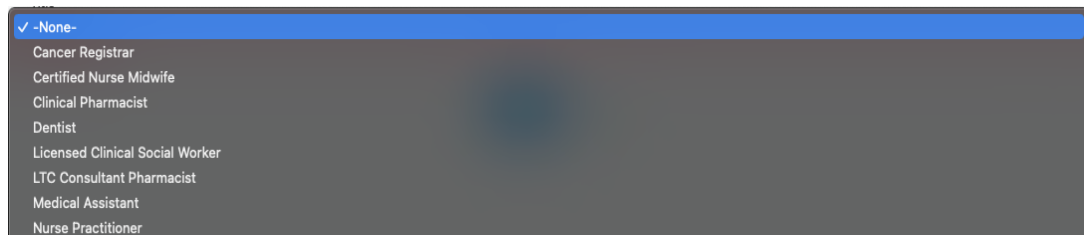
HOME ACCOUNTS USERS **ADD USERS**

Single User Bulk User

*Title
-None-
Complete this field.

Submit Cancel

1c



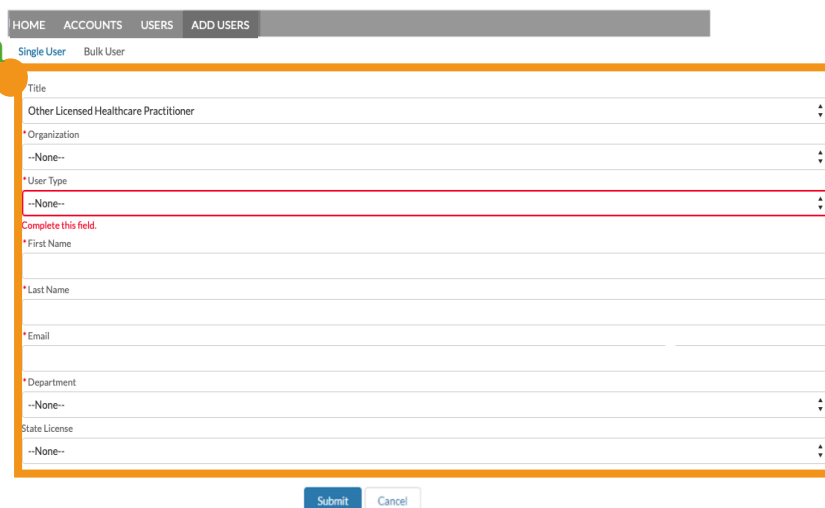
✓ -None-
Cancer Registrar
Certified Nurse Midwife
Clinical Pharmacist
Dentist
Licensed Clinical Social Worker
LTC Consultant Pharmacist
Medical Assistant
Nurse Practitioner

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”

2a



HOME ACCOUNTS USERS **ADD USERS**

Single User Bulk User

*Title
Other Licensed Healthcare Practitioner

*Organization
--None--

*User Type
--None--
Complete this field.

*First Name

*Last Name

*Email

*Department
--None--

State License
--None--

Submit Cancel

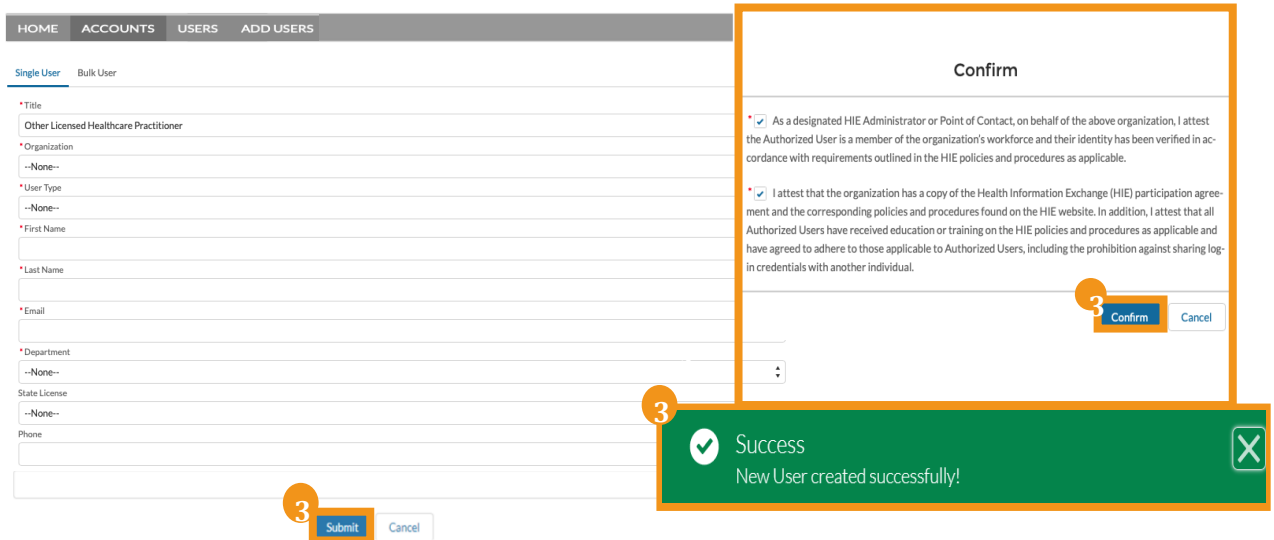
Submitting a New User and Attestation

(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.

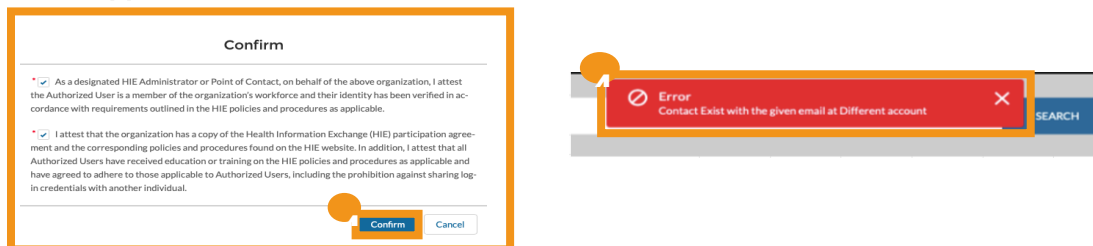


The screenshot shows the 'Add Users' form with a 'Confirm' dialog box open. The dialog box contains two checkboxes: 'As a designated HIE Administrator or Point of Contact, on behalf of the above organization, I attest the Authorized User is a member of the organization's workforce and their identity has been verified in accordance with requirements outlined in the HIE policies and procedures as applicable.' and '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.' Below the checkboxes are 'Confirm' and 'Cancel' buttons. A green success message banner at the bottom right reads 'Success New User created successfully!'.

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

(3b) 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**



The screenshot shows the 'Confirm' dialog box with an error message banner at the bottom. The banner is red and reads 'Error Contact Exist with the given email at Different account'. Below the banner are 'Confirm' and 'Cancel' buttons.

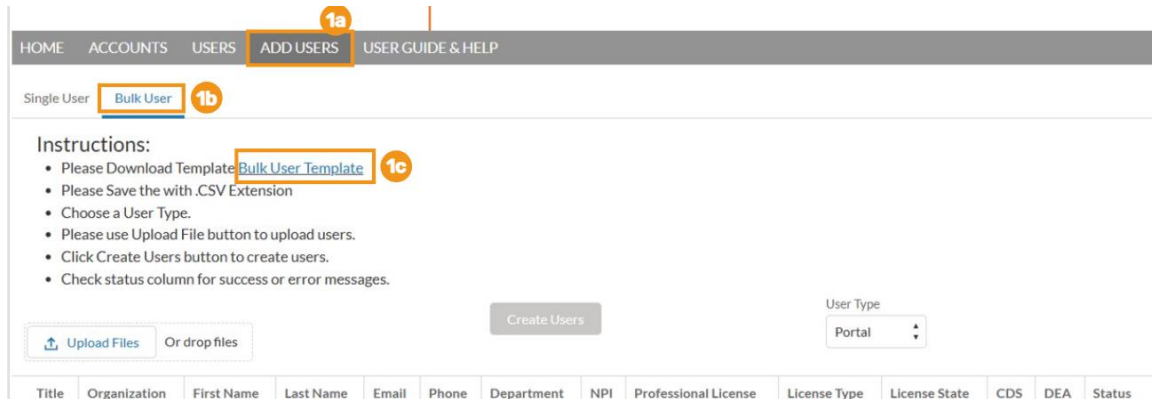
Creating Multiple Users (Bulk Upload)

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 template type



(2a) Click Upload Files to select your file. Please note, the file must be saved as a .csv file. All other file formats will not be accepted

NOTE: Follow this same process to reactivate a User that is currently deactivated. Access to services for these Users must be provisioned again, see Provisioning Services section for detailed instructions.

Creating Individual Users

This section outlines the process and requirements for creating and managing individual user accounts.

Create Individual User

When creating an individual user, all required fields must be completed at the time of account creation. **The user's email address cannot be modified once the account is created.**

Required fields include:

- First Name
- Last Name
- Email Address
- Department



- Phone Number
- Professional Licenses (if applicable)

Ensure all information is accurate before saving, as certain fields (including email address) cannot be edited after submission