



**FLORIDA HIE**











# HIE Admin Tool Guide



●●● CRISP  
Shared Services

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# 1. 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.

## 1.1 Admin Responsibilities



Add new users for your organization’s HIE account(s).



Deactivate user accounts for staff who leave your organization or no longer require access.



Audit users at least every 90 days to maintain access and prevent suspension.



Support password resets and activation link resends as needed.



Provision (assign) HIE services to users and remove services when no longer needed.

## 1.2 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.

## 1.3 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.

1.1 Introduction and Overview

- **Account:** A legal physical entity. Some HIE Administrators have access to multiple accounts within their larger organization.
- **Audit:** The process of verifying (approving) or denying user access at least every 90 days.
- **Active User:** A user whose access to HIE tools is active.
- **Suspended User:** A user whose access has lapsed due to inactivity, inappropriate use, missing 90-day audit, or employment changes.
- **Encounter Notification:** Alerts that support continuity of care by notifying an organization about a patient encounter elsewhere (triggered by ADT, EMS, VSA/death data, etc.).
- **Population Explorer:** User-friendly interface for reviewing patients’ encounters through CSS Event Notification Delivery (CEND), providing access to the latest encounters and at least six months of encounter history.
- **Prescription Drug Monitoring Program (PDMP):** Access to this service can be obtained by calling HIE Technical User Support Team at 866-554-7255

2. Accessing the Tool



2.1 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.

2.2 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)

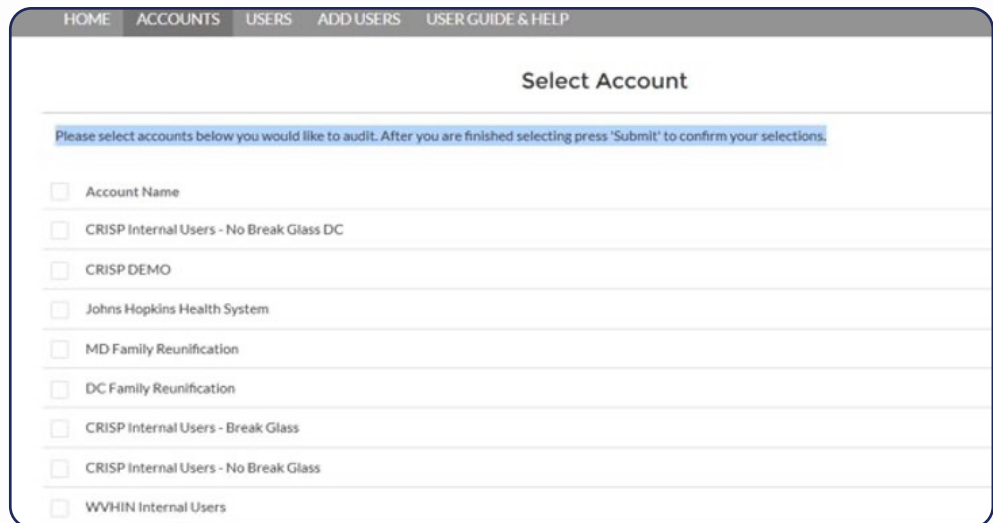
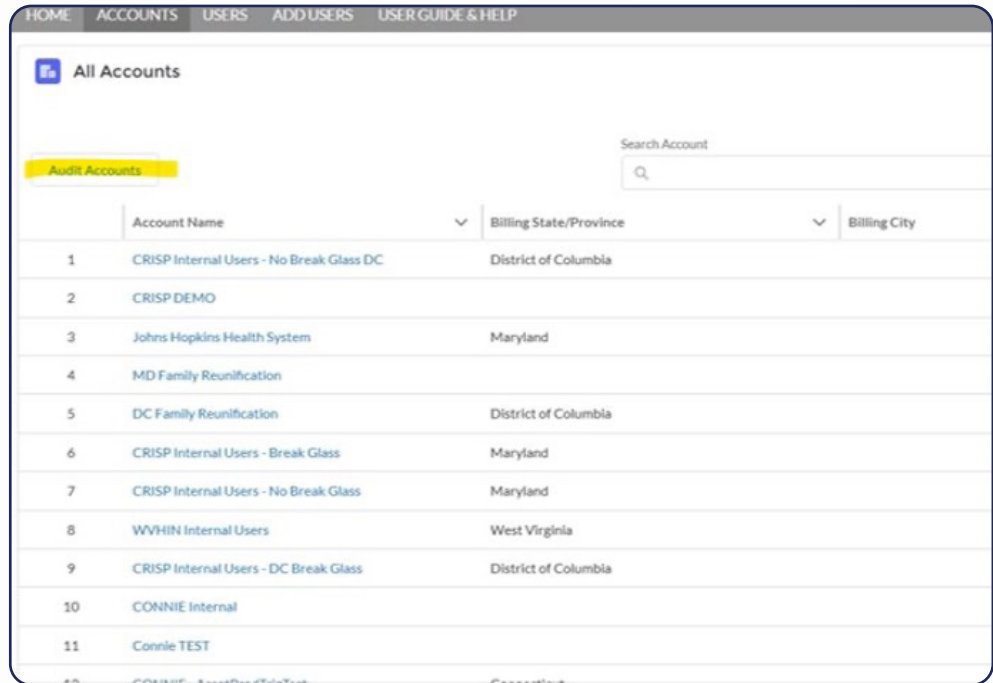
# 3. Auditing Users (Required Every 90 Days)



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.

## 3.1 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.



**3. Auditing Users (Required Every 90 Days)**

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

	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		

**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

## 3. Auditing Users (Required Every 90 Days)

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

### HIE Admin - User Audit Page

**Audit Accounts:**  
 Approve - Keeps the user(s) Active and updates their Audit Date to today.  
 Deny - Deactivates the user(s) and they will no longer be displayed on your audit page.  
 No Selection - The user "Status" will remain the same and the Audit Date will not be updated.  
 NOTE: All users must be verified once every 90 days to maintain access.

Active Users    Suspended Users

Active Users Approve Current Page

Status	First Name	Last Name	Email	Account N...	Member Ti...	Department	Audit Date	Audit By
<div style="display: flex; gap: 5px;"> <div style="border: 2px solid #0070C0; padding: 2px 5px;">Approve</div> <div style="border: 2px solid #0070C0; padding: 2px 5px;">Deny</div> </div>								
<div style="display: flex; gap: 5px;"> <div style="border: 2px solid #0070C0; padding: 2px 5px;">Approve</div> <div style="border: 2px solid #0070C0; padding: 2px 5px;">Deny</div> </div>								

7. Confirm account selection and click 'Submit.'

### All Accounts

Audit Accounts

Search Account

	Account Name	Billing State/Province	Billing City
1	CRISP Internal Users - No Break Glass DC	District of Columbia	
2	CRISP DEMO		

Account Name: CRISP DEMO

Parent Account:

Account: **CRISP DEMO**

Industry: Ambulatory Medical

[+ Follow](#)   [User Export](#)   [User Audit](#)

**DETAILS**   PANELS   SERVICES   ACTIVE USERS   SUSPENDED USERS

Account Name: CRISP DEMO    Phone: \_\_\_\_\_

Parent Account: \_\_\_\_\_    Website: \_\_\_\_\_

# 4. 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.

## 4.1 Managing Active Users

- 2a. To work with Active Users, ensure the Active User tab is selected
- 2b. Select Approve to continue a user’s access to tools for existing staff. If all users should be approved, you can select Approve Current Page on the right side of the screen
- 2c. Select Deny to revoke access for individuals who are no longer employees within your organization
- 2d. Select Complete Audit, confirm selections on User Confirmation Page then select “Finish”

**Audit Account : Jones Practice LLC**  
 Approve - Keeps the user(s) Active and updates their Audit Date to today.  
 Deny - Deactivates the user(s) and they will no longer be displayed on your audit page.  
 No Selection - The user "Status" will remain the same and the Audit Date will not be updated.  
**NOTE: All users must be verified once every 90 days to maintain access.**

Search

2a **Active User** | Suspended User

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

2b **Approve Current Page**

2d **Complete Audit** | Cancel

## 4.2 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.

## 4. Managing Existing Users

- 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.

Status	Name	Email	Member Title	Department	Audit Date	Audit By
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	Laughter Ajibade	laughter@test.com	Nurse Practitioner		2021-03-16	2021-03-16
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	Peter Shay	shay@test.com	Physician, Intern		2021-03-17	2021-03-17
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	Test Thu1	testthu1@test.com	Dentist		2021-03-17	2021-03-17
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	Nick Redfurn	nick@test.com			2021-03-18	2021-03-18
<input type="button" value="Approve"/> <input type="button" value="Deny"/>	test singleuser	test@sunuser.com	Dentist		2021-03-18	2021-03-18

## 4.3 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
pencil2eraser2	pencil2eraser2@gkjdsfld.com

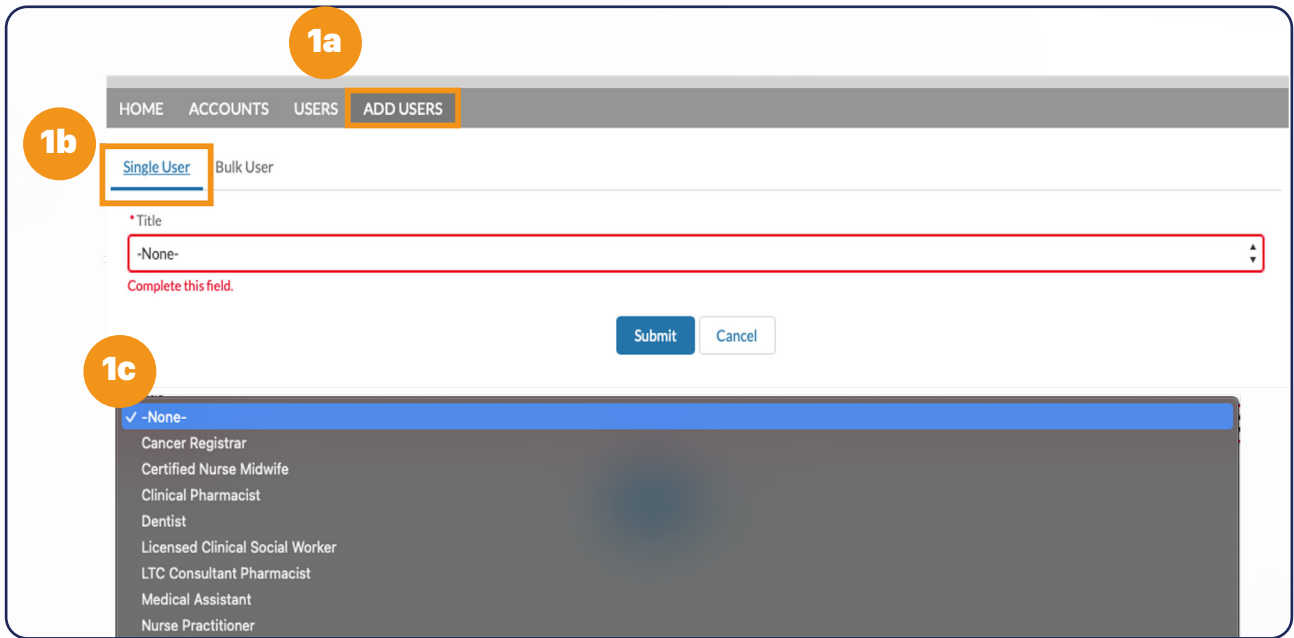
✓ Success  
All records Successfully Updated
✕

# 5. Creating Individual Users



## 5.1 Selecting a Title

- 1a. To provide access to HIE tools, click the Add Users tab at the top of the home screen
- 1b. Ensure “Single User” is underlined
- 1c. Select applicable Title from drop-down list

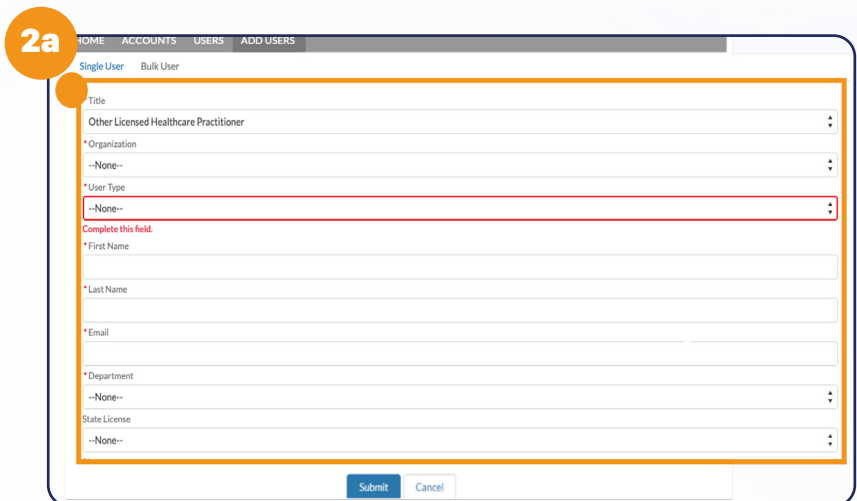


# 6. Creating a New User



- 2a. Complete the following fields. Keep in mind that all fields marked with asterisks \* are required

**NOTE:** \*User Type – select “Portal” remind the User to reset their password if unable to log in.



# 7. 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)

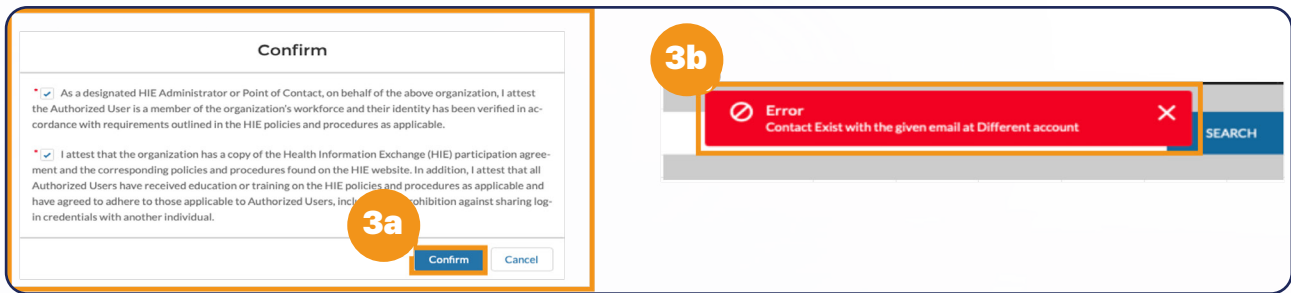
**NOTE: It is highly recommended adding the User’s organizational email. Personal emails are discouraged. After user creation, Email, First Name, Middle Name, and NPI cannot be modified for security reasons.**

The screenshot displays the 'ADD USERS' section of the HIE Admin Tool. On the left, there is a form for creating a 'Single User'. The form includes fields for Title (with a dropdown menu), Organization, User Type, First Name, Last Name, Email, Department, State License, and Phone. A 'Submit' button is located at the bottom of the form, highlighted with a red circle labeled '3a'. To the right of the form, a 'Confirm' dialog box is open, containing two checked checkboxes with their respective terms and conditions. A 'Confirm' button is highlighted with a red circle labeled '3b'. Below the dialog box, a green success message pop-up is visible, stating 'Success New User created successfully!' with a close button (X) on the right. A red circle labeled '3c' is positioned near the success message.

# 8. New User Creation Error



- 3a. 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**

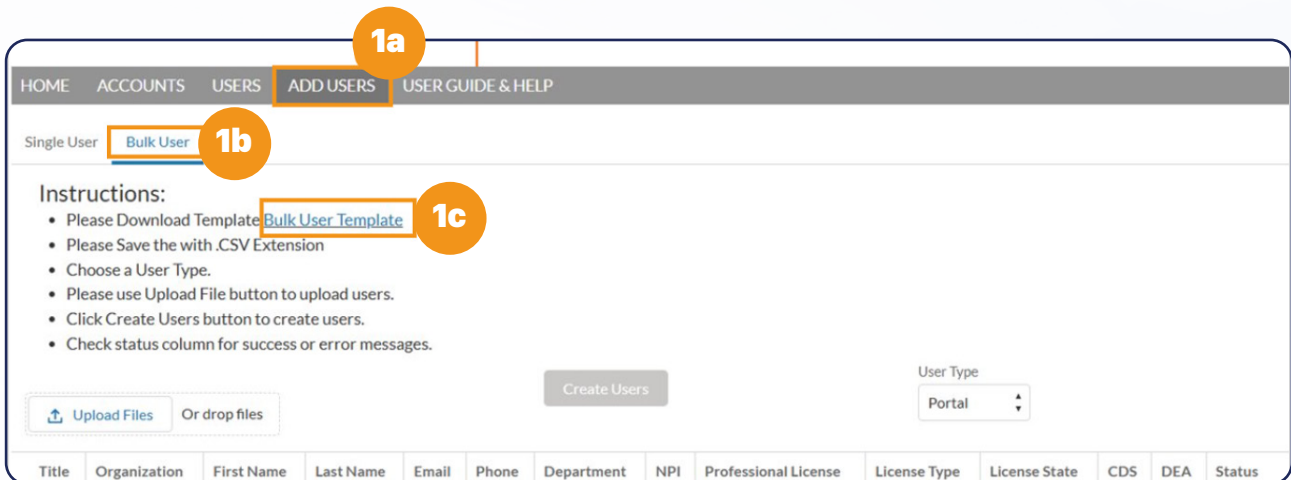


# 9. Creating Multiple Users (Bulk Upload)



## 9.1 Preparing the Bulk Upload Form

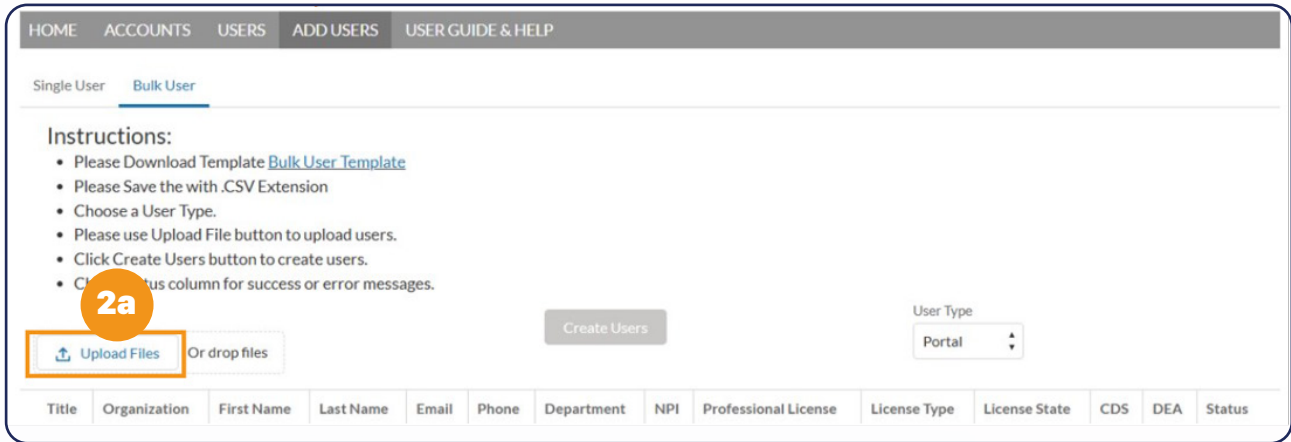
- 1a. Click the Add Users tab at the top of the home screen
- 1b. Click the Bulk User tab
- 1c. Click the Bulk User Template link



**9. Creating Multiple Users (Bulk Upload)**

**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.



HOME ACCOUNTS USERS ADD USERS USER GUIDE & HELP

Single User Bulk User

**Instructions:**

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

**2a**

Upload Files Or drop files

Create Users

User Type  
Portal

Title	Organization	First Name	Last Name	Email	Phone	Department	NPI	Professional License	License Type	License State	CDS	DEA	Status
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# FLORIDA HIE



## CONNECTING Health Data Across Florida



[flhie.org](http://flhie.org)



For technical support, contact  
**877-940-6144**



[info@flhie.org](mailto:info@flhie.org)

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



**CRISP**  
Shared Services