RHODE ISLAND HIE

HIE Admin Tool Guide

JULY 2026

RIHIE.org 866-957-4254

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).

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.

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.
- **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.

2. Accessing the Tool

2.1 First-time Access

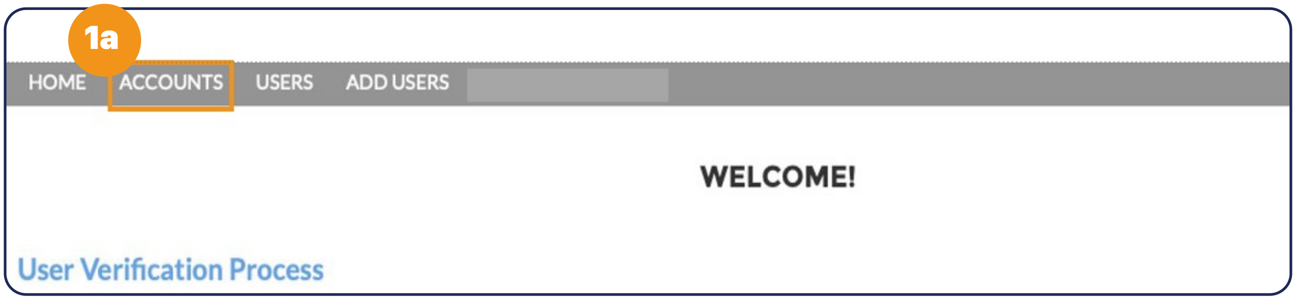
If this is your first time accessing the Tool, refer to your welcome email for instructions. You are required to create a password and set up two-factor authentication on your account. Enter your login credentials in the fields provided.

2.2 Existing HIE Admin Users

Log on to you HIE portal account.

2.3 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 users at least every 90 days to maintain access. The Admin Tool now provides enhanced visibility into user activity, including log in status, to support more informed audit decisions. Administrators can identify users who have never logged in or have been inactive and take appropriate action (Approve, Resend Activation, or Deny Access)

3.1 Understanding User Activity Status

During the audit process, administrators can now view:

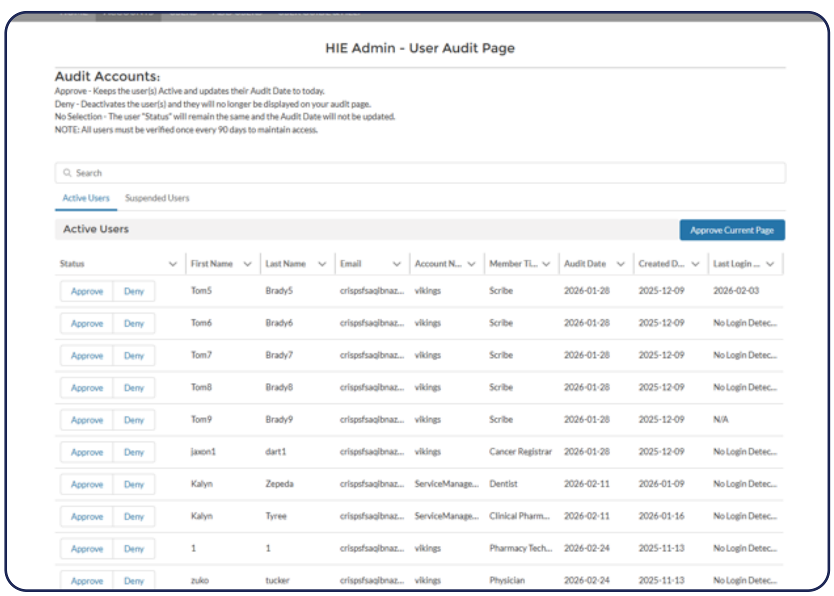
- "Last Login Date"
  - Displays the most recent login activity
  - "No Login Detected" indicates the user has never accessed the system
  - "N/A" indicates users without portal access that still require auditing
- "Created date"
  - Displays the date account was granted access

How To Use This Information

This information helps administrators determine whether access should be maintained, reactivated, or removed.

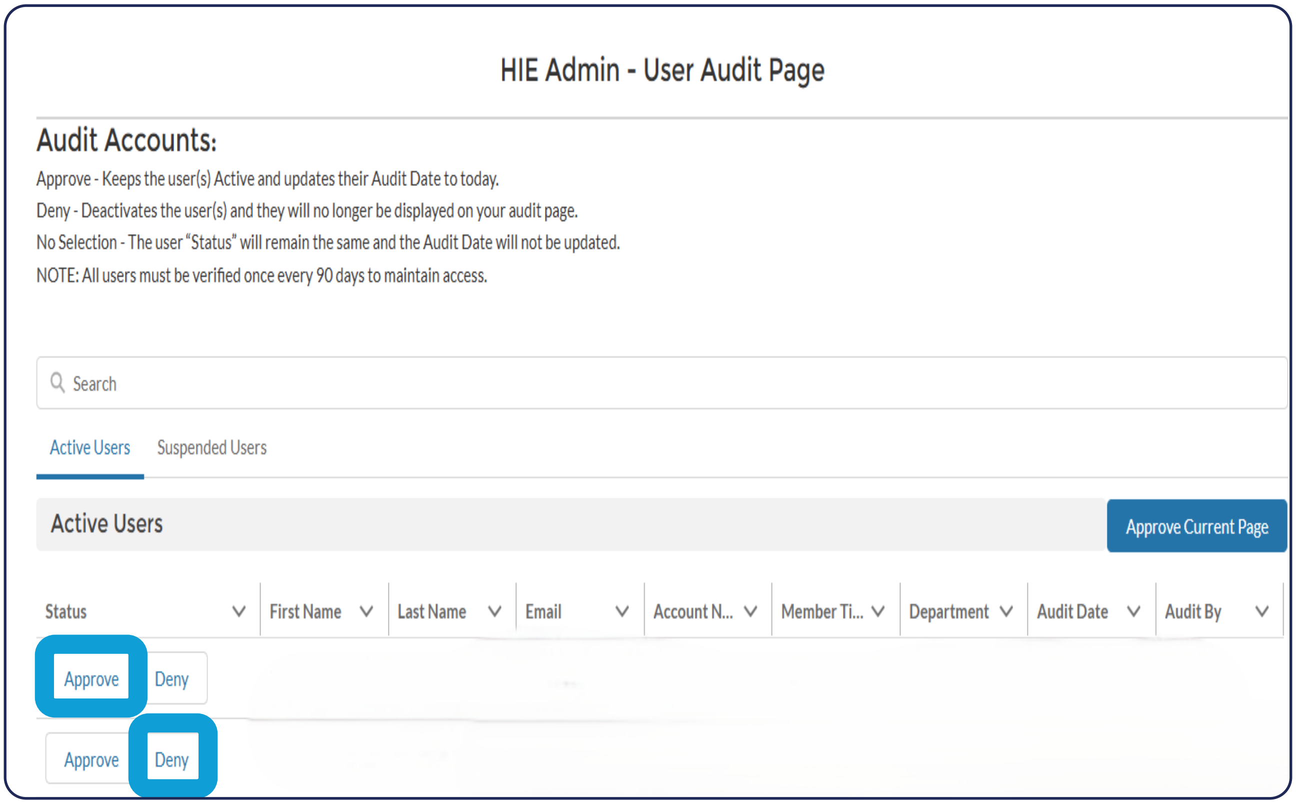
3.2 Auditing Multiple Accounts

1. Log in to the HIE Admin Tool.
2. Select "Audit Users."
3. Select the account(s) you would like to audit.

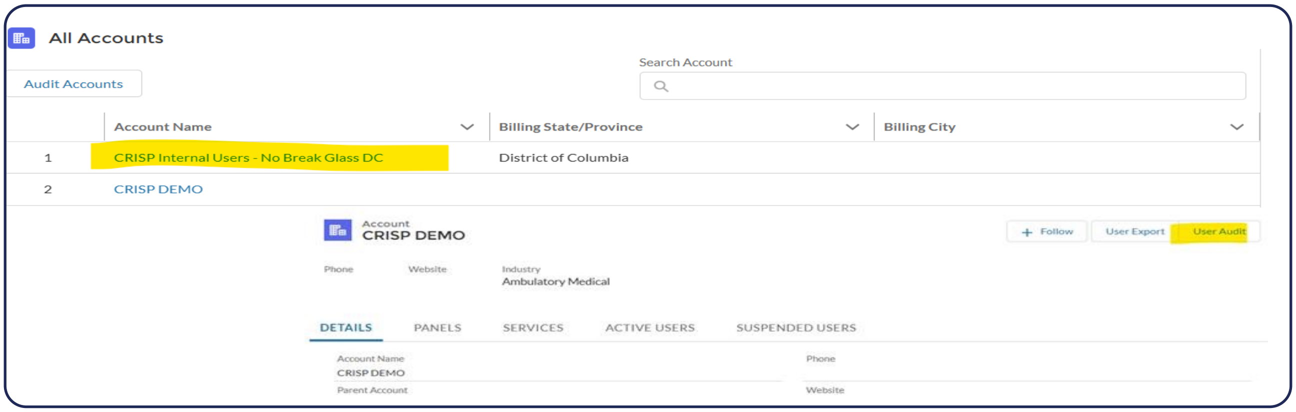


3. Auditing Users (Required Every 90 Days)

4. Click '**Submit**' to confirm your selections.
5. Confirm account selection and click '**Submit**.'
6. Review users for each selected account
7. Use available date (e.g. Last Login Date) to assess activity
8. Choose an action for each user: Approve (Maintain Access), Resend Activation (Prompt User to Active / Login), or Deny (Remove Access if No Longer needed)



9. Confirm account selection and click '**Submit.**'



4. Managing Existing Users

Every 90 days, HIE Administrators must verify each HIE user within their organization.

The Admin Tool provides visibility into user activity to support this process.
To ensure your patients and their health information are protected, Administrators should review login history and user status to determine whether access should be maintained.

- Users who have never logged in may require activation or removal
- Users who are inactive should be evaluated for continued access

If a user is not verified within the 90 day period, their access to HIE tools will be suspended.

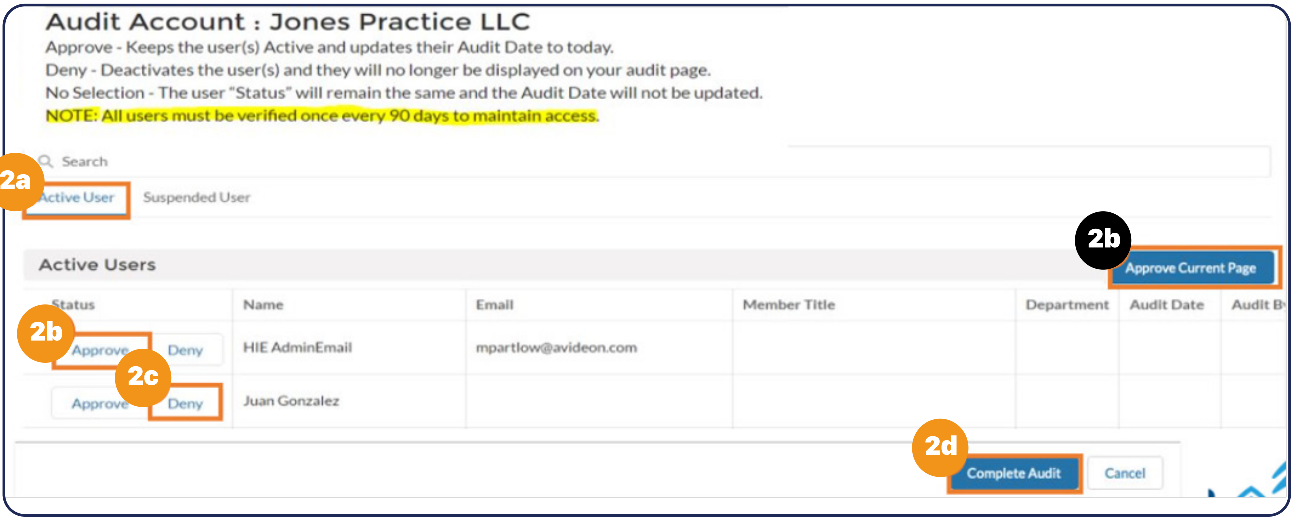
4.1 Managing Active Users

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**"



4.2 Managing Suspended Users

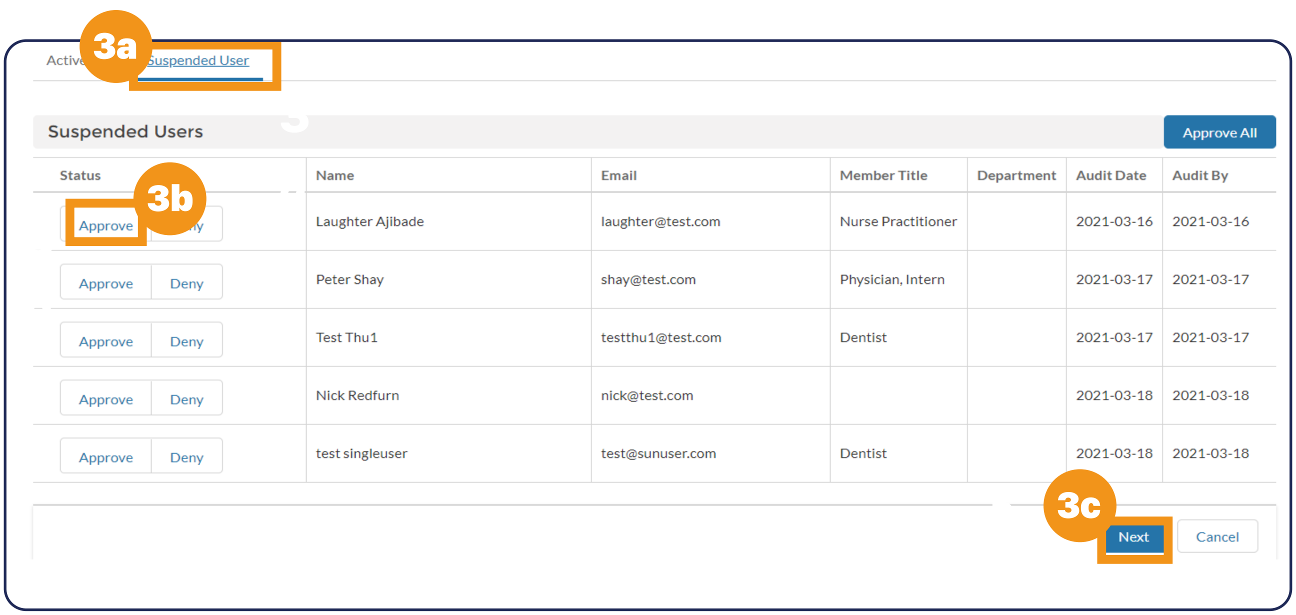
Suspended users appear when access has lapsed (for example, due to missing audits orinactivity). If a suspended user is approved, remind them to reset their password if they cannot log in.

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

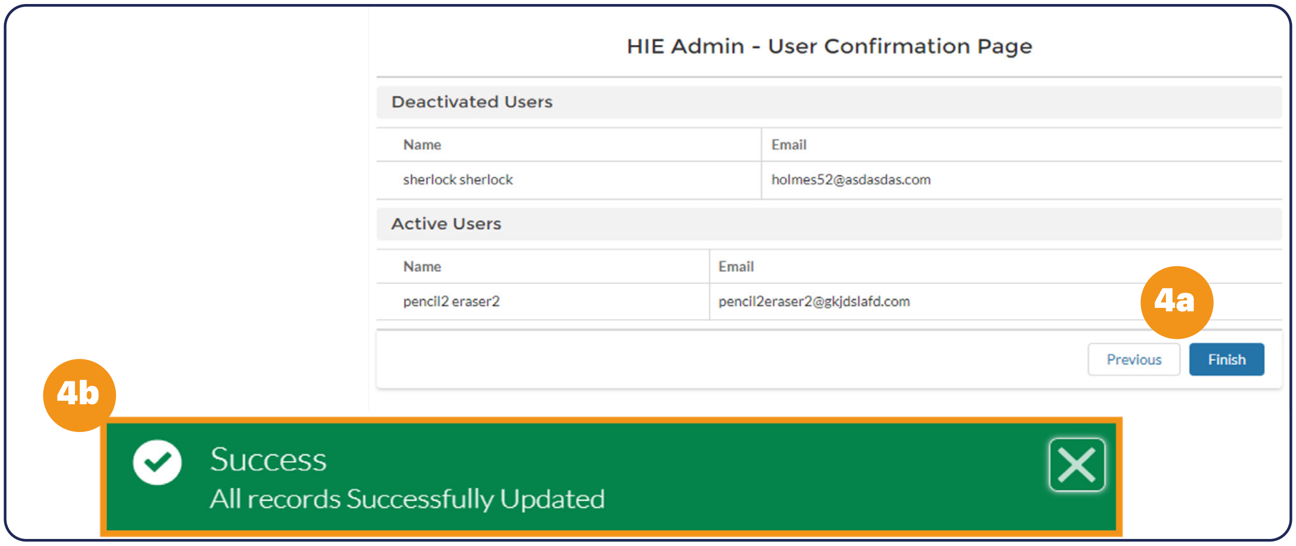
NOTE: Users in suspended status for 90 days will be deactivated. If a suspended User is approved, remind the User to reset their password if unable to log in.



4.3 Confirming An Audit

4a. Upon clicking Finish, you will see the Success prompt

4b. You have successfully managed your users

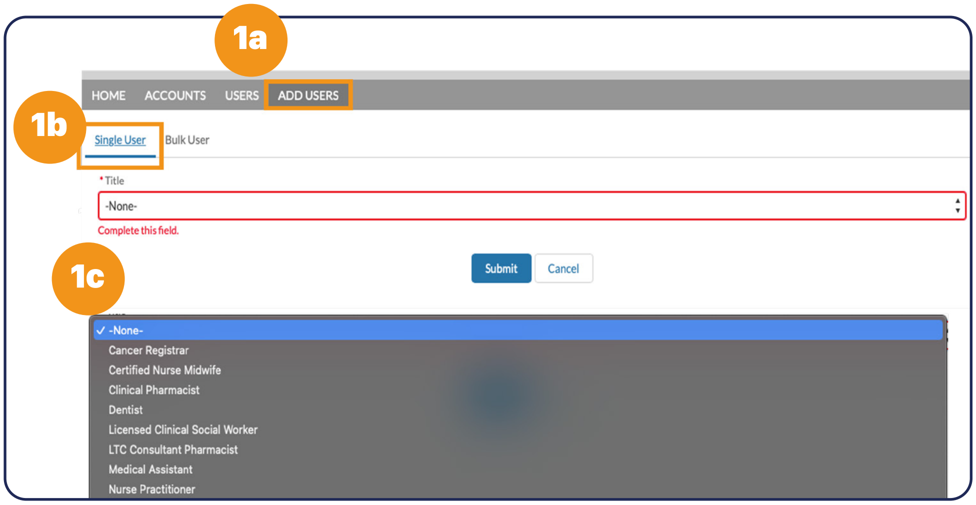


5. Creating Individual Users vs. Creating New Users

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

5.1 Selecting a Title

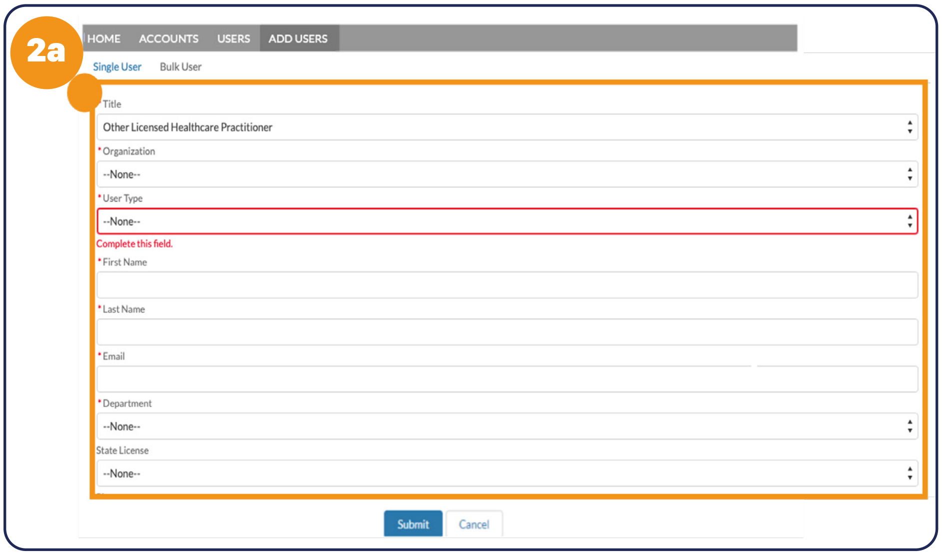
1a. To provide access to HIE tools, click the Add Users tab at the top of the home screen
1b. Ensure "Single User" is underlined
1c. Select applicable Title from drop-down list



5.2 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"*



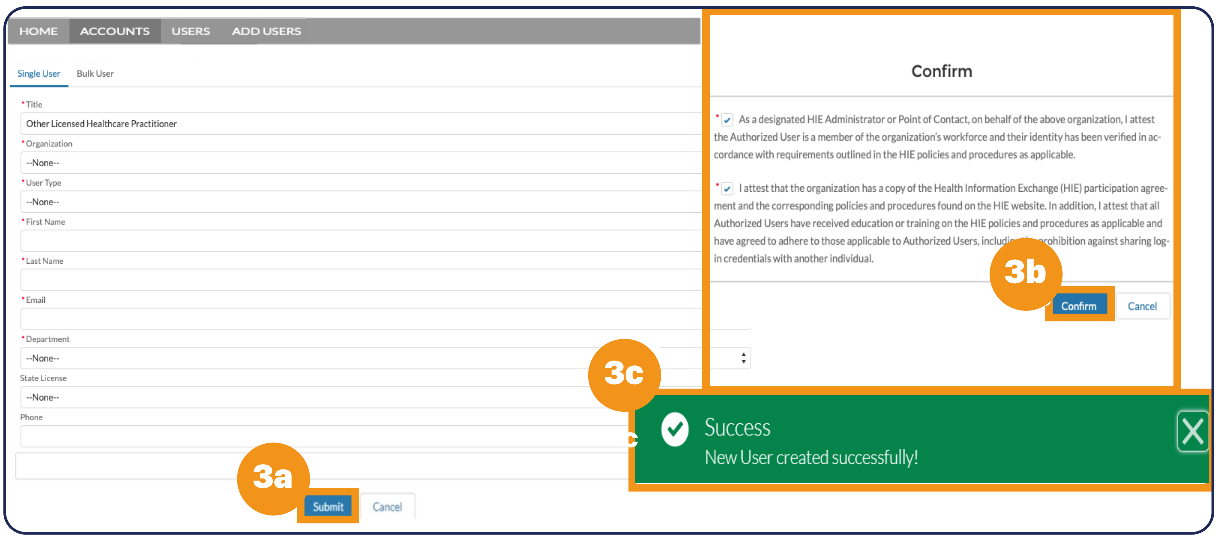
5.3 Submitting a New User and Attestation

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)

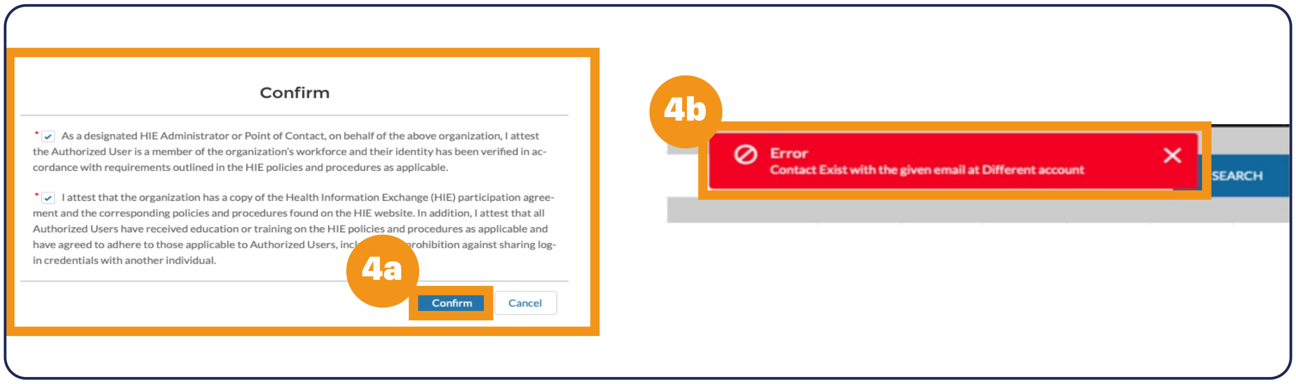
NOTE: It is highly recommended adding the User's organizational email. Personal emails are discouraged. After user creation, Email, First Name, Middle Name, and NPI cannot be modified for security reasons.



5.4 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

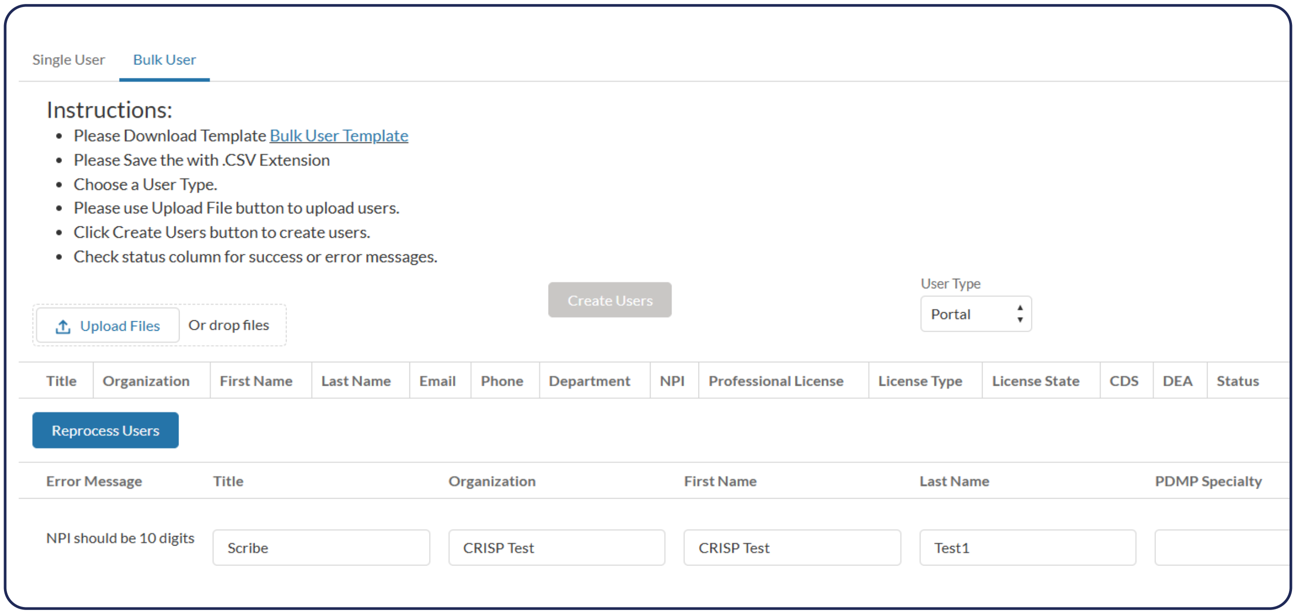
4b. Upon attempt to create a new User with an email address that is already in the system, you will receive an error message: **Contact Exists with the given email at a different account**. This could be at an account you manage or another account within the system. **Search for the User in accounts that you manage – see User Search section. If the User does not exist in an account you manage, contact Technical User Support**



5.5 Reprocessing Users with Errors

5a. 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

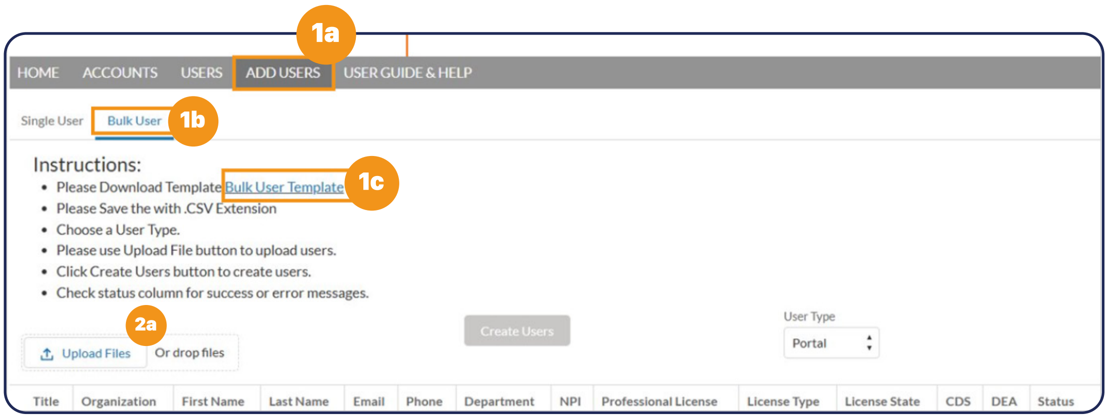
5b. Complete the indicated field updates and click the Reprocess Users button
Note: *Any Users with errors uncorrected during this process will need to be entered individually in the Single User tab or another Bulk upload. Window to update Users with errors will no longer be available after navigating away from this screen*



6. Creating Multiple Users (Bulk Upload)

6.1 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** tab



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 accepte

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.

6.2 Creating Individual Users

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.

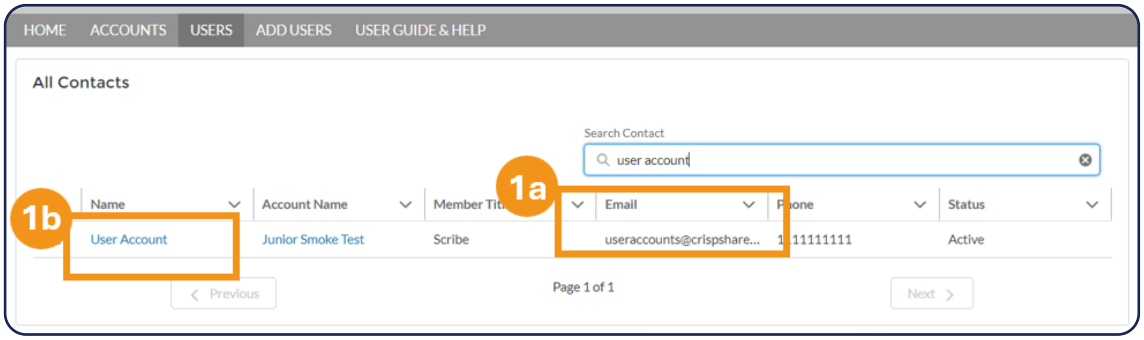
7. Provisioning Services for Single and Multiple Users

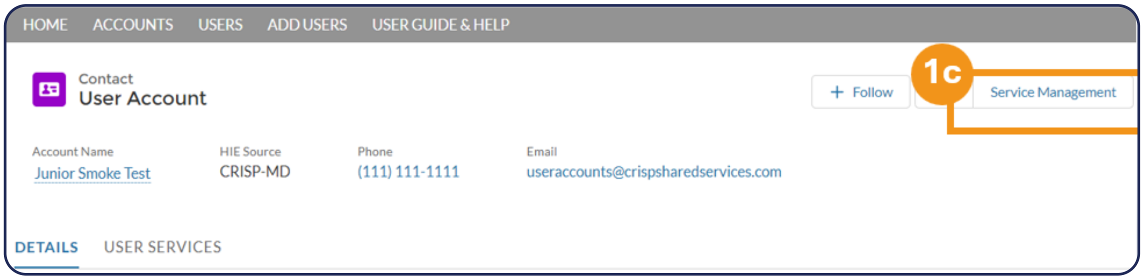
This section outlines the process and requirements for provisioning services to single and multiple users.

7.1 Single Users

7.1.1 Assign Services

1a. Access the active User using the search bar in the **Users tab**
1b. Click on the **User's name**
1c. Select **Service Management**
1d. Select **Assign Services**

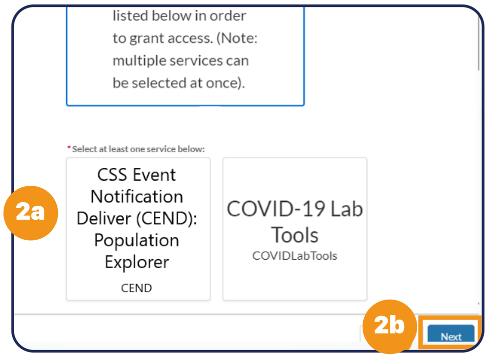


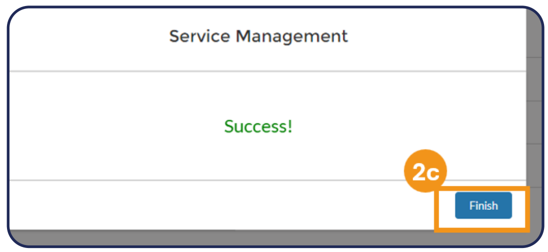


7.1 Single Users (cont.)

7.1.2 Selecting Services

2a. Assign Service: Select Service you wish to assign
2b. Click **Next** **2c.** Click **Finish**



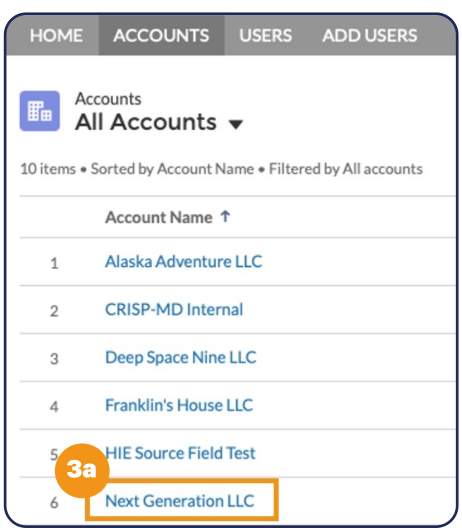


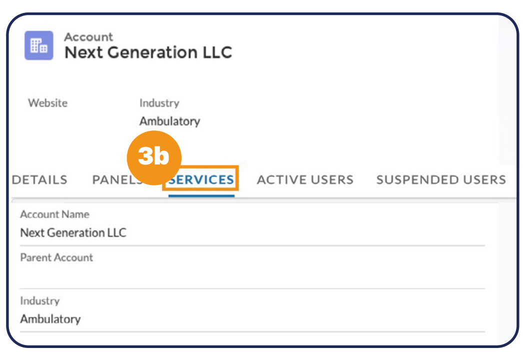
7.2 Multiple Users

HIE Administrators can provision a service to multiple users through their associated account. (ex: Upon creation of multiple new users via bulk upload)

7.2.1 Adding Users to Services

3a. Select the Account associated with the Users who need access to a service
3b. Select Services tab – the Service tab will display all services available for Admins to add to users of this account





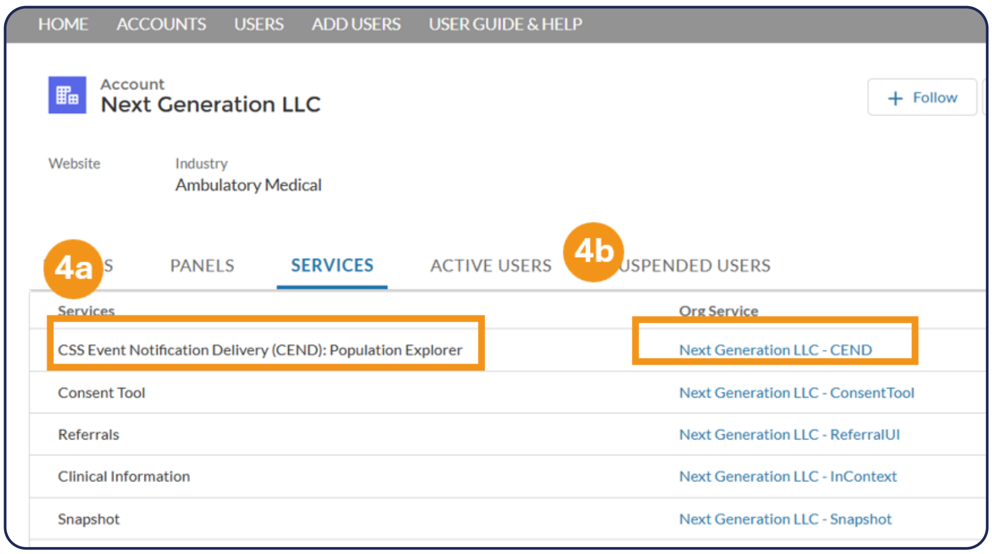
7.2 Multiple Users (cont.)

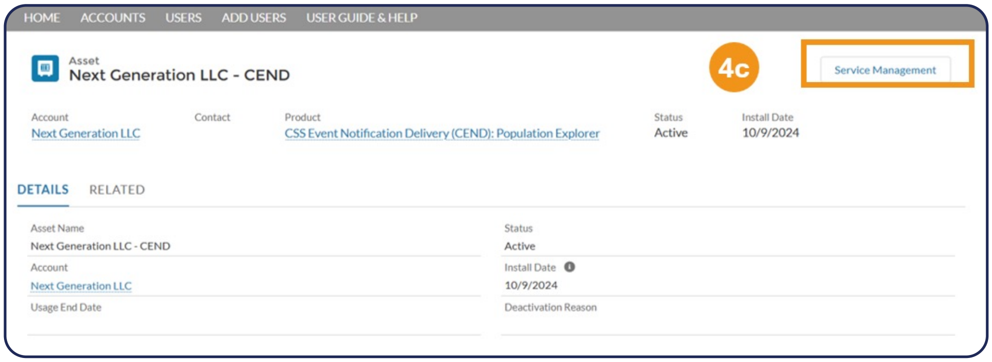
7.1.2 Selecting Services

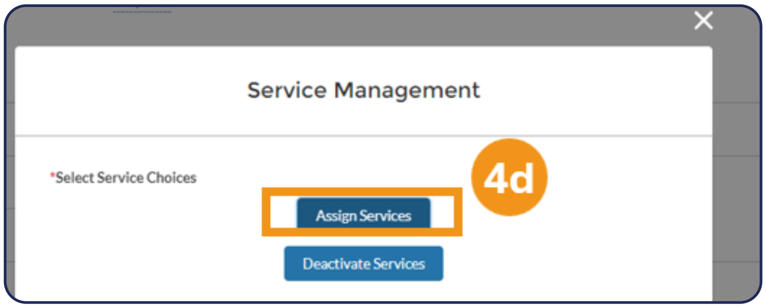
4a. Identify service name in the "**Service**" column

4b. Click on the Org Service **blue hyperlink** (next to the Service) you would like to provision to Users

4c. Click **Service Management** **4d.** Click **Assign Services**





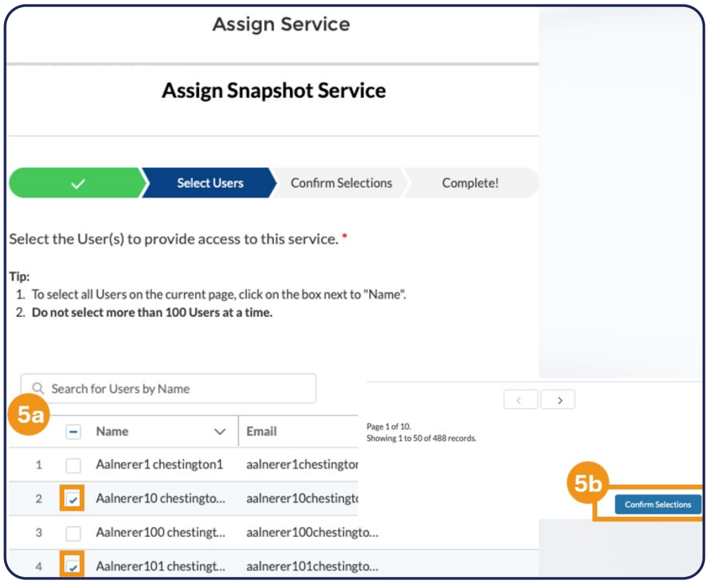


7.2 Multiple Users (cont.)

7.2.3 Select Users

5a. Select the User(s) you are granting access this service by checking the box name to their name

5b. Click Confirm Selections

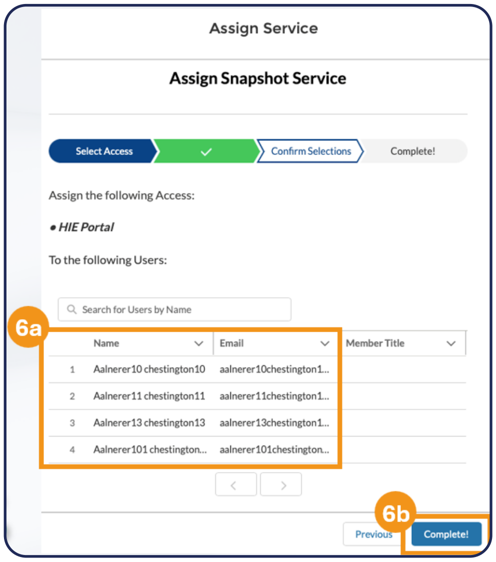


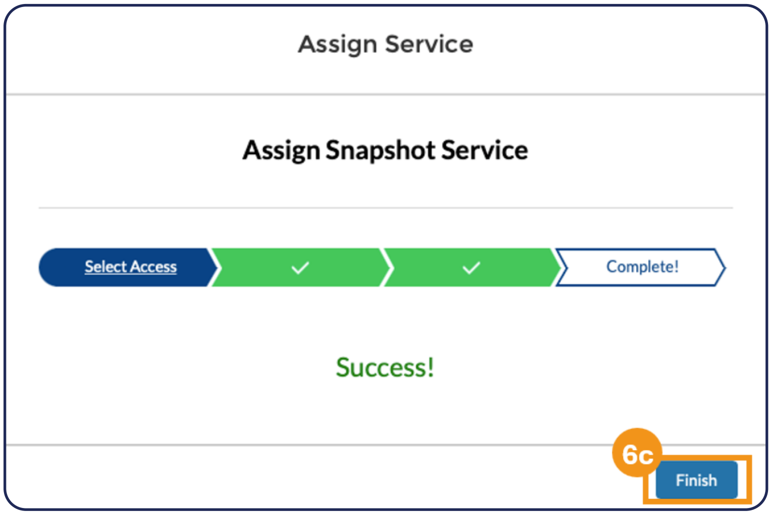
7.2.4 Confirm Selections

5a. Review and confirm list of users who should access this service

5b. click Complete!

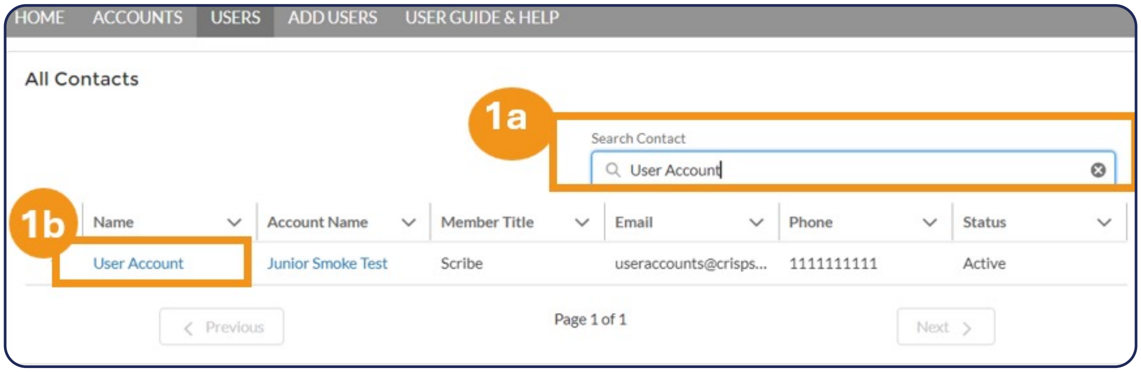
5c. Success! You have provisioned access of a service to multiple users, Click Finish

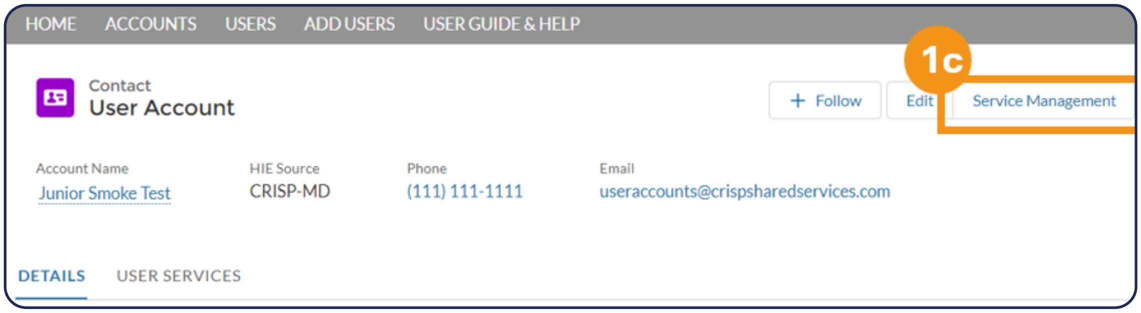


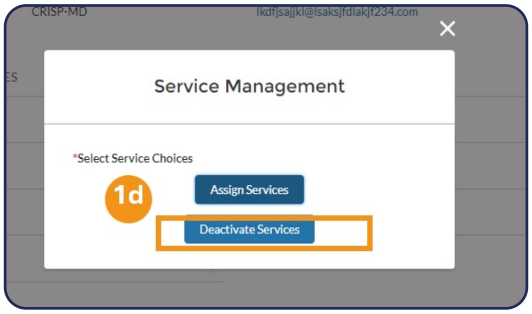


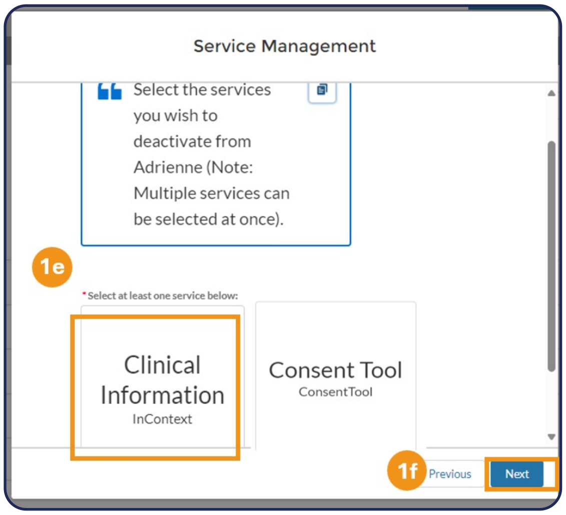
8. Deactivating Services for a Single User

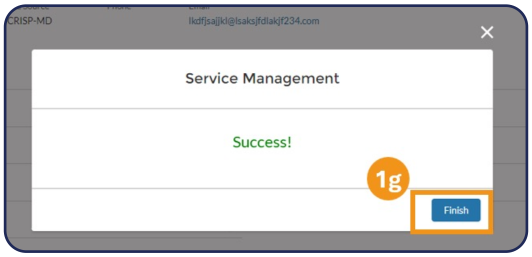
1a. Access the active User using the search bar at the top of the Users tab
1b. Click on the User's name
1c. Click Service Management **1d.** Click Deactivate Services
1e. Click on the Service(s) you wish to deactivate
1f. Click Next **1g.** Click Finish











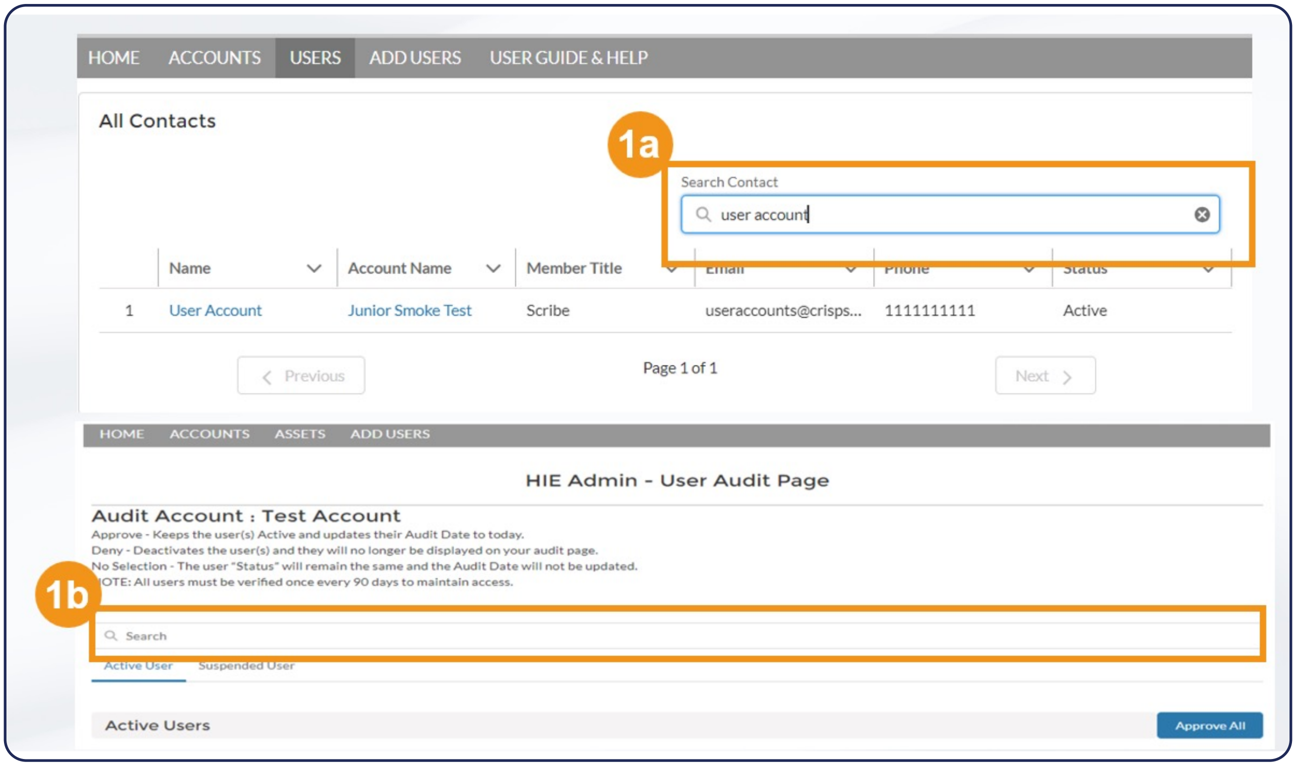
9. User Search

9.1 Locating a User

Search for Users in any account you manage:

1a. Enter User's first name, last name, full name or email address in the search bar at the top of the Users tab **Search for Users within the User Audit Page**

1b. Enter the User's first or last name in the search bar

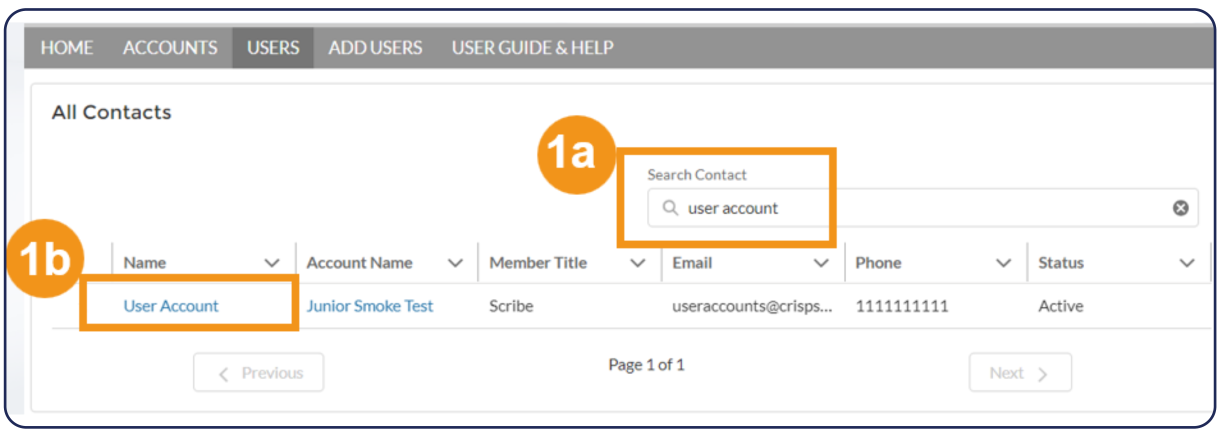


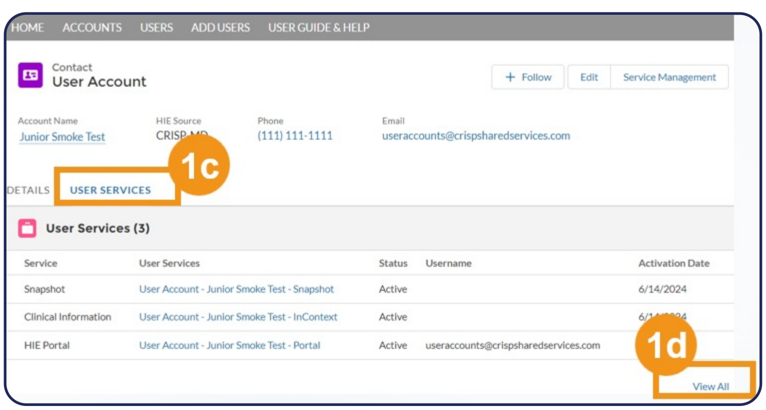
10. Password/Activation Email Reset

10.1 User Password or Activation Email Reset

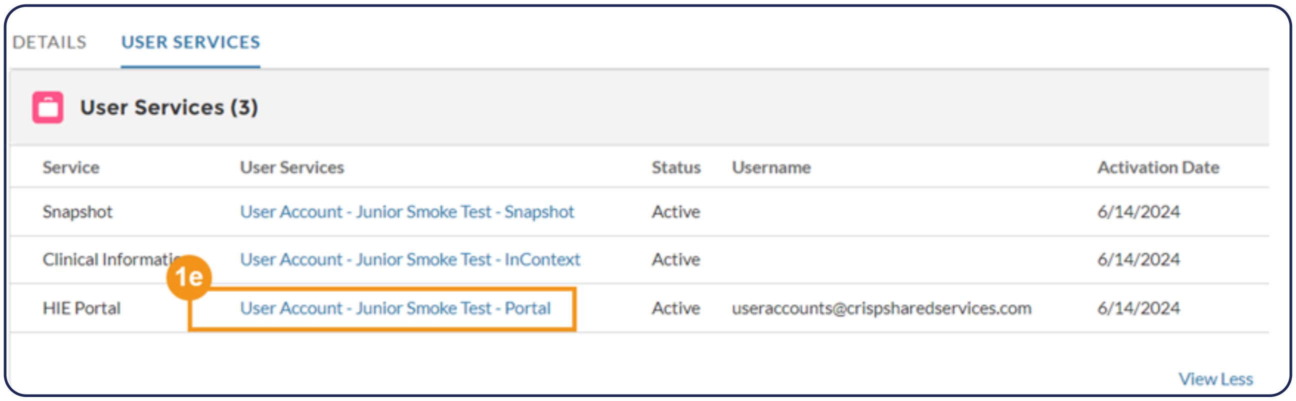
User HIE Portal password or activation email can be reset in the HIE Admin Tool

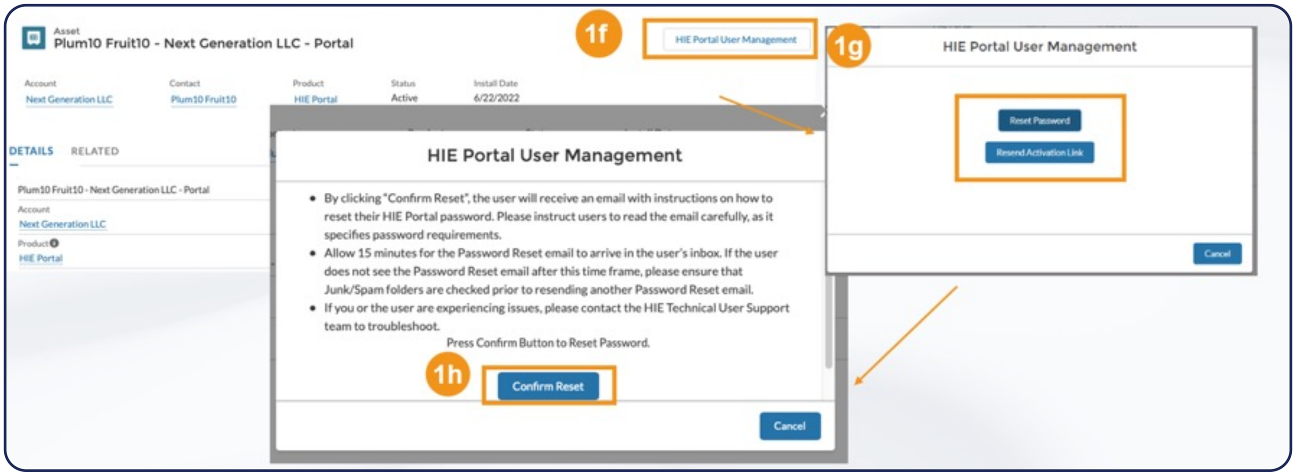
1a. Search for **User** in Users tab
1b. Click on **User's name**
1c. Click on **User Services** tab
1d. Click **View All** to expand view
1e. Click on the **blue hyperlink name** in the User column associated with Portal only: **<username><account name>Portal**
1f. Click on **HIE Portal User Management**
1g. Click on **Reset Password or Resend Activation Link** from the PopUp Window
The Resend Activation Link will be greyed out if a user has already activated their account
1h. Read the instructions then click on **Confirm Reset**





10.1 User Password or Activation Email Reset (cont.)



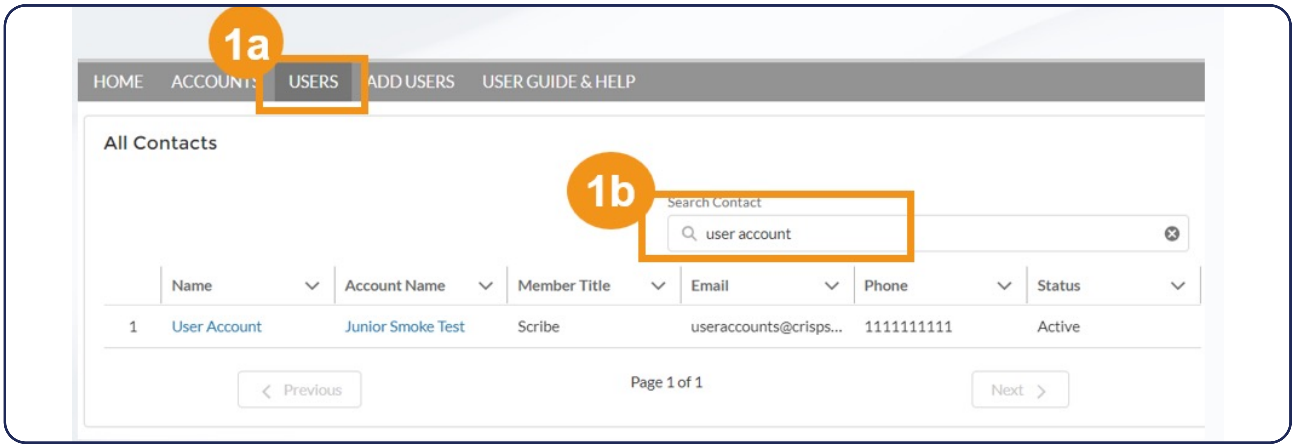


11. Editing User Details

11.1 Choosing a User

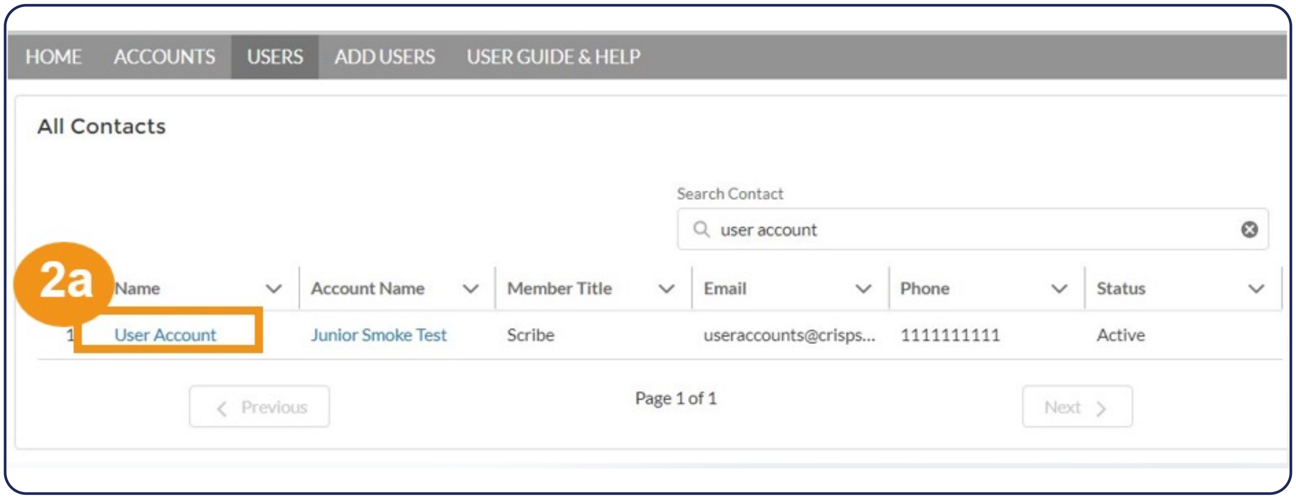
1a. Go to Users tab

1b. Enter name or email in the search and hit enter



11.2 Viewing and Selecting a Contact

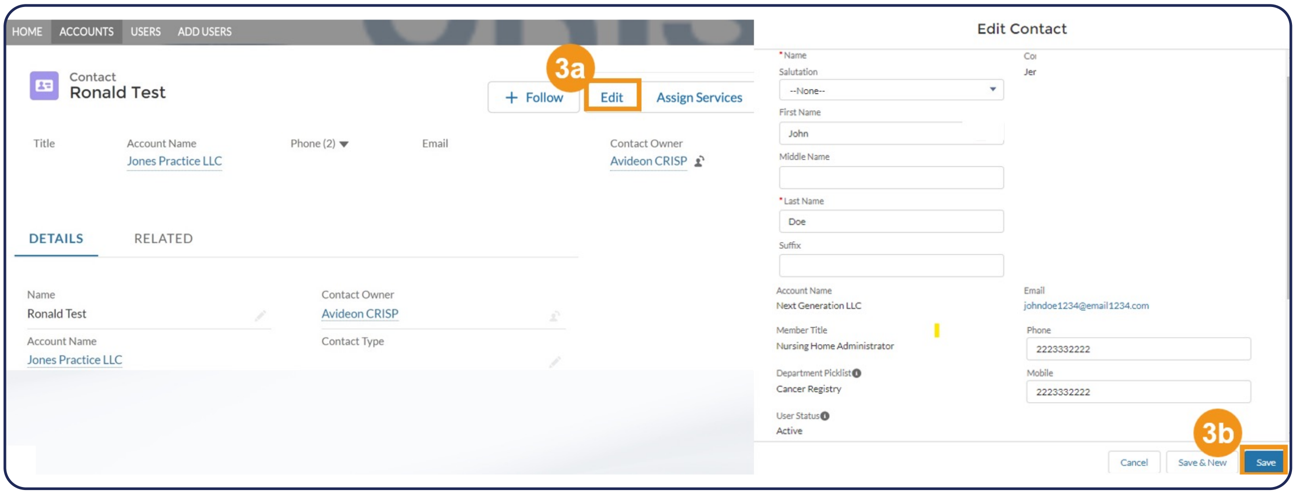
2a. Choose the Contact (User) you would like to view by clicking on the Contact Name



11.3 Editing and Saving a Contact

Note: For security purposes, HIE Admins may only edit existing user's Last Name, Salutation, Suffix and Phone Number. If needing to edit an existing user's e-mail, please contact Technical User Support OR deactivate the current user account and create a new one with the user's updated e-mail.

3a. Select **Edit** to update the contact information
3b. Select **Save** to confirm the updated information



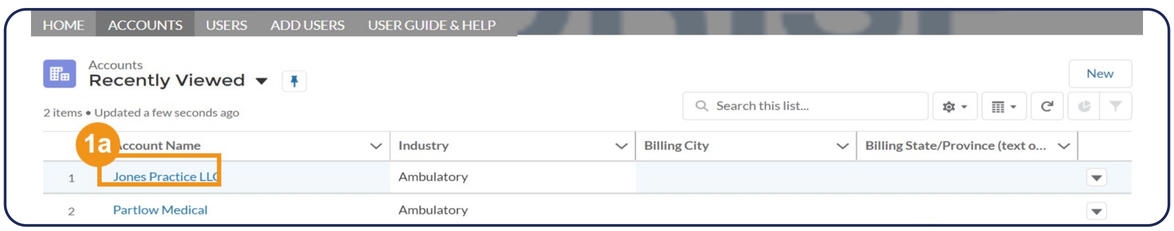
12. Bulk Export User List

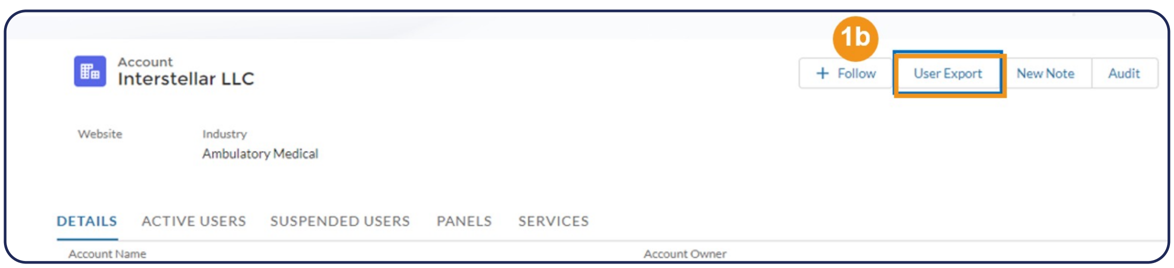
12.1 Choosing an Account

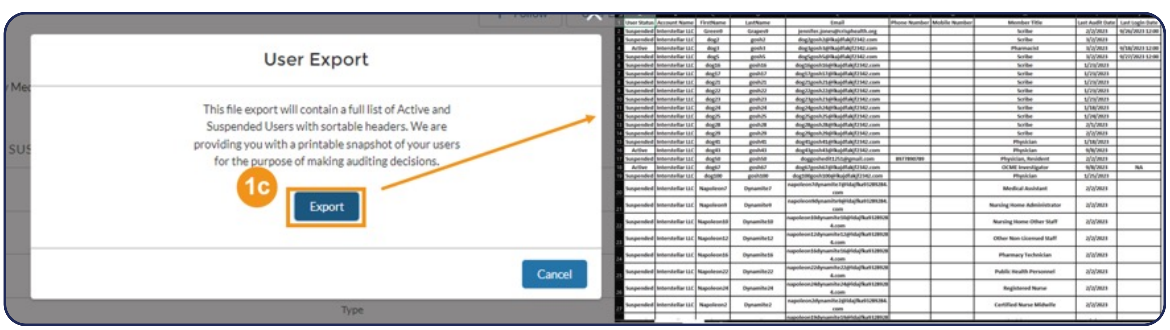
User HIE Portal password or activation email can be reset in the HIE Admin Tool

1a. Choose the Account you would like to view by clicking on the Account Name
1b. Click <u>User Export</u> on the top right tool bar
1c. Click the <u>Export</u> button to confirm the Excel download. ***Note: the file will contain a full list of Active and Suspended Users***

Users will show in this report if their access of HIE Portal or SES Direct is Active or Suspended. The last column 'Last Login Date' will store the last login date for the User's HIE Portal account. If the cell is blank, the user has never logged into HIE Portal. If the cell contains a date, that is the last recorded date we have logged into HIE Portal. If the cell contains 'NA' they are either a SES Direct user, in which case we do not currently share the last login date.







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RIHIE.org 866-957-4254 support@rihie.org

Revision History		
Version Number	**Date**	**Summary of Change**
1.0	January 2026	Initial Version
2.0	March 2026	Updated last login
3.0	July 2026	Matched Power Point

CRISP Shared Services