



HIE Admin Tool Guide

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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.

1. Introduction and Overview

- **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

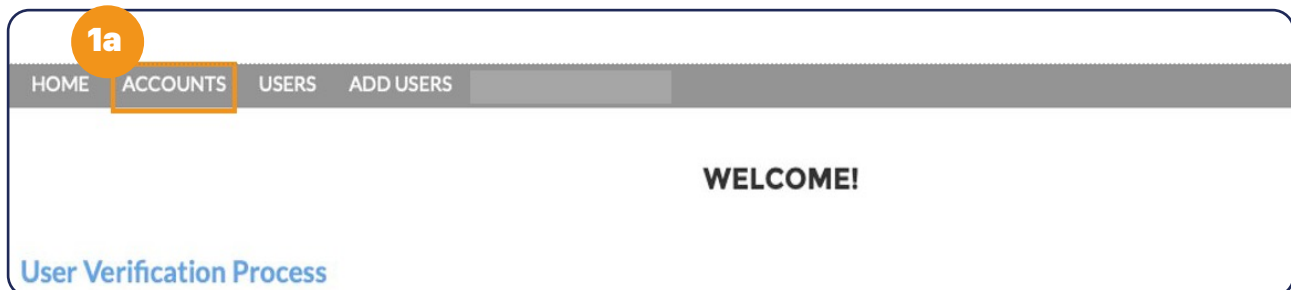
If this is your first time accessing the Tool, refer to your welcome email for instructions. You are required to create a password and set up two-factor authentication on your account. Enter your login credentials in the fields provided.

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.

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.

Q Search

Active Users Suspended Users

Approve Current Page

Status	First Name	Last Name	Email	Account N...	Member TL...	Audit Date	Created D...	Last Login ...
Approve Deny	Tom5	Brady5	crispisagbnaz...	vikings	Scribe	2026-01-28	2025-12-09	2026-02-03
Approve Deny	Tom6	Brady6	crispisagbnaz...	vikings	Scribe	2026-01-28	2025-12-09	No Login Detec...
Approve Deny	Tom7	Brady7	crispisagbnaz...	vikings	Scribe	2026-01-28	2025-12-09	No Login Detec...
Approve Deny	Tom8	Brady8	crispisagbnaz...	vikings	Scribe	2026-01-28	2025-12-09	No Login Detec...
Approve Deny	Tom9	Brady9	crispisagbnaz...	vikings	Scribe	2026-01-28	2025-12-09	N/A
Approve Deny	jaxon1	dart1	crispisagbnaz...	vikings	Cancer Registrar	2026-01-28	2025-12-09	No Login Detec...
Approve Deny	Kalyn	Zepeda	crispisagbnaz...	ServiceManage...	Dentist	2026-02-11	2026-01-09	No Login Detec...
Approve Deny	Kalyn	Tyree	crispisagbnaz...	ServiceManage...	Clinical Pharm...	2026-02-11	2026-01-16	No Login Detec...
Approve Deny	1	1	crispisagbnaz...	vikings	Pharmacy Tech...	2026-02-24	2025-11-13	No Login Detec...
Approve Deny	julio	tucker	crispisagbnaz...	vikings	Physician	2026-02-24	2025-11-13	No Login Detec...

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)

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
Approve Deny								
Approve Deny								

9. 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

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"

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

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

2d

2b

4. Managing Existing Users

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.

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 Suspended User

Suspended Users Approve All

Status	Name	Email	Member Title	Department	Audit Date	Audit By
3b 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

3c Next Cancel

4. Managing Existing Users

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
pencil2 eraser2	pencil2eraser2@gkjdsfafid.com

Previous

Finish

4b

✓

Success

All records Successfully Updated

✕

4a

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

The screenshot shows the 'ADD USERS' tab selected. The 'Single User' option is underlined. The 'Title' dropdown menu is open, showing a list of roles including Cancer Registrar, Certified Nurse Midwife, Clinical Pharmacist, Dentist, Licensed Clinical Social Worker, LTC Consultant Pharmacist, Medical Assistant, and Nurse Practitioner. The 'Submit' and 'Cancel' buttons are visible at the bottom.

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"

The screenshot shows the 'ADD USERS' tab selected. The 'Single User' option is underlined. The form fields are visible, including Title, Organization, User Type, First Name, Last Name, Email, Department, and State License. The 'User Type' dropdown menu is open, showing a list of roles including Cancer Registrar, Certified Nurse Midwife, Clinical Pharmacist, Dentist, Licensed Clinical Social Worker, LTC Consultant Pharmacist, Medical Assistant, and Nurse Practitioner. The 'Submit' and 'Cancel' buttons are visible at the bottom.

5. Creating Individual Users vs. Creating New User

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.

The screenshot shows the 'Single User' form in the HIE Admin Tool. The form has fields for Title, Organization, User Type, First Name, Last Name, Email, Department, State License, and Phone. The 'Confirm' screen displays two attestation statements with checkboxes. A green success message pop-up is visible at the bottom right.

3a points to the Submit button on the form.

3b points to the Confirm button on the attestation screen.

3c points to the Success message pop-up.

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. Creating Individual Users vs. Creating New User

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 prohibition against sharing login credentials with another individual.

4a
Confirm
Cancel

4b

Error
Contact Exist with the given email at Different account
×

SEARCH

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

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.
- Check status column for success or error messages.

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
Reprocess Users													
Error Message	Title	Organization	First Name	Last Name	PDMP Specialty								
NPI should be 10 digits	Scribe	CRISP Test	CRISP Test	Test1									

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 Template](#)

The screenshot shows the HIE Admin Tool interface. At the top, there is a navigation bar with tabs: HOME, ACCOUNTS, USERS, ADD USERS (highlighted with callout 1a), and USER GUIDE & HELP. Below the navigation bar, there is a sub-tab bar with 'Single User' and 'Bulk User' (highlighted with callout 1b). The main content area is titled 'Instructions:' and contains a list of steps: 'Please Download Template Bulk User Template' (highlighted with callout 1c), '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.', and 'Check status column for success or error messages.' Below the instructions, there is a 'Create Users' button and a 'User Type' dropdown menu set to 'Portal'. At the bottom, there is a table with columns: Title, Organization, First Name, Last Name, Email, Phone, Department, NPI, Professional License, License Type, License State, CDS, DEA, and Status. The 'Upload Files' button is highlighted with callout 2a.

- 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.

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
- Department
- Last Name
- Phone Number
- Email Address
- 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

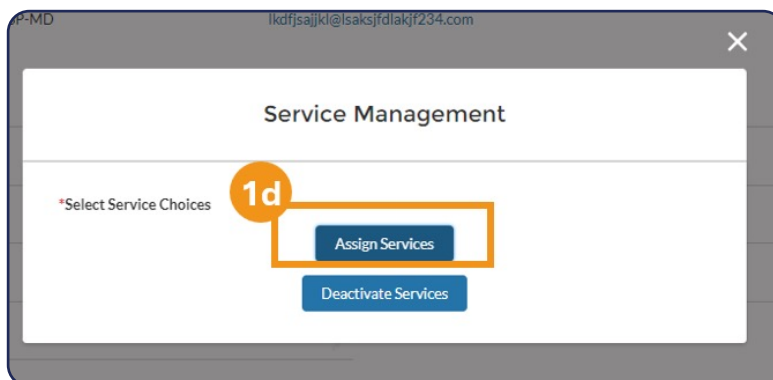
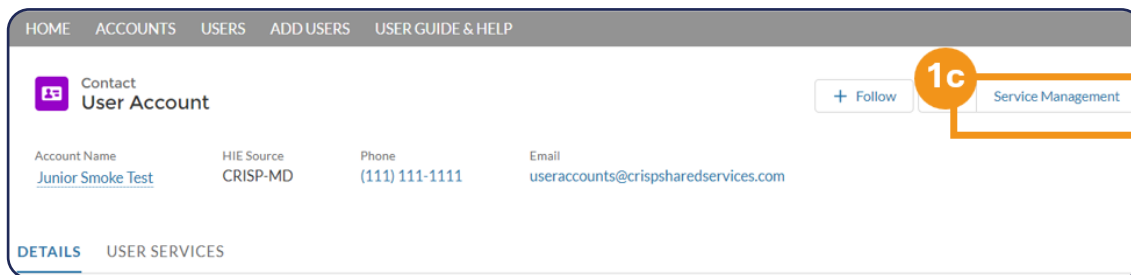
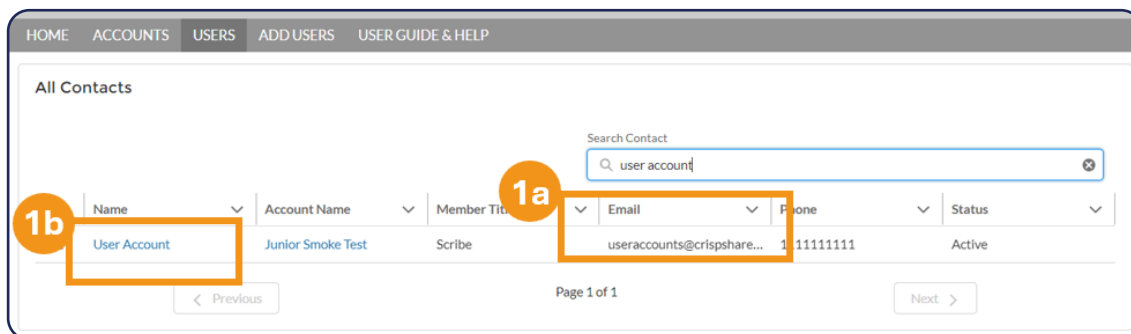


This section outlines the process and requirements for provisioning services to single and multiple users.

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**



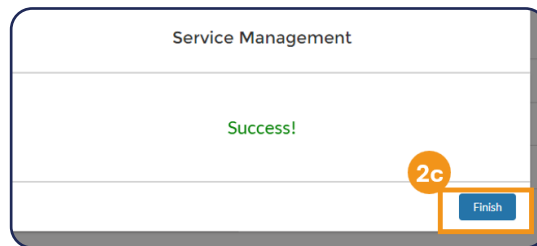
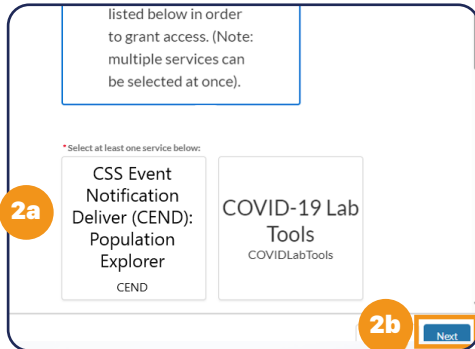
7. Provisioning Services for Single and Multiple

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](#)



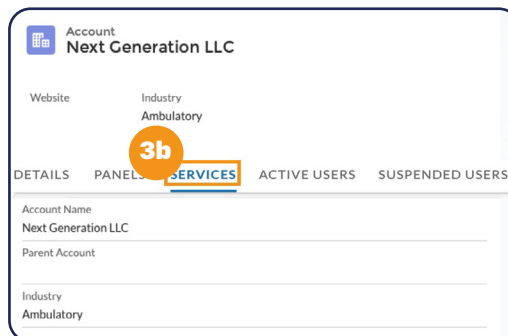
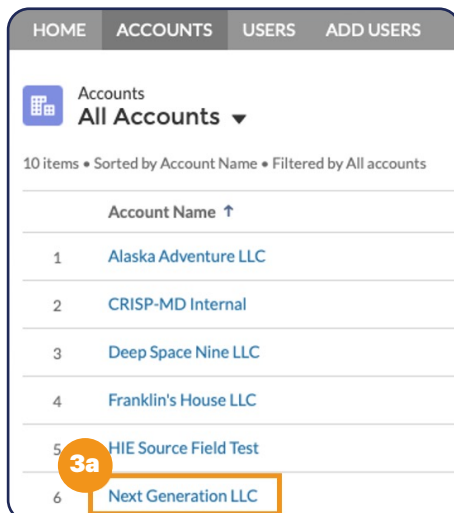
7.2 Multiple Users

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. Provisioning Services for Single and Multiple

7.2 Multiple Users (cont.)

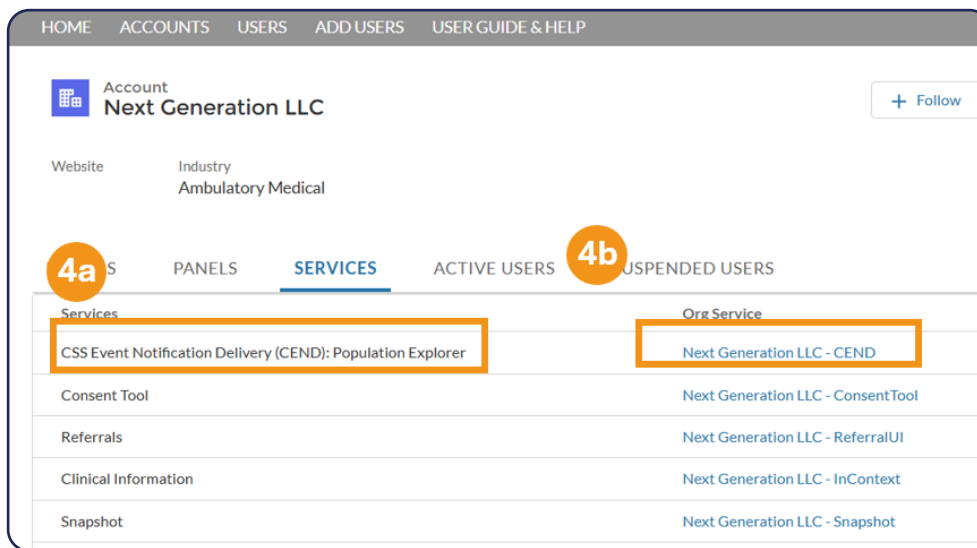
7.1.2 Selecting Services

4a. Identify service name in the “Service” column

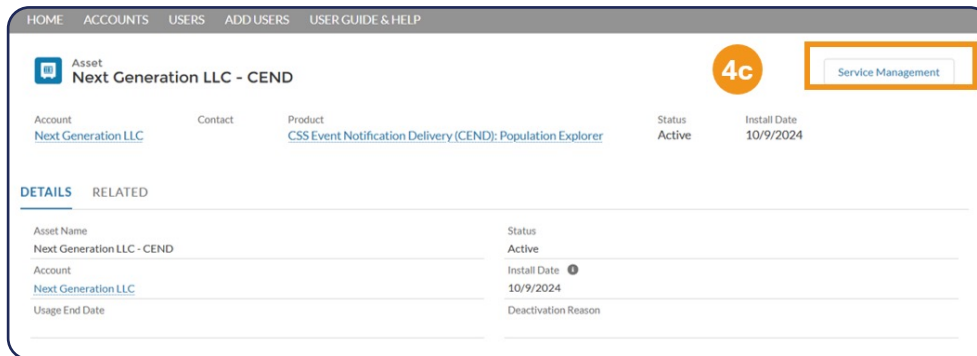
4b. Click on the Org Service blue hyperlink (next to the Service) you would like to provision to Users

4c. Click Service Management

4d. Click Assign Services



Services	Org Service
CSS Event Notification Delivery (CEND): Population Explorer	Next Generation LLC - CEND
Consent Tool	Next Generation LLC - ConsentTool
Referrals	Next Generation LLC - ReferralUI
Clinical Information	Next Generation LLC - InContext
Snapshot	Next Generation LLC - Snapshot

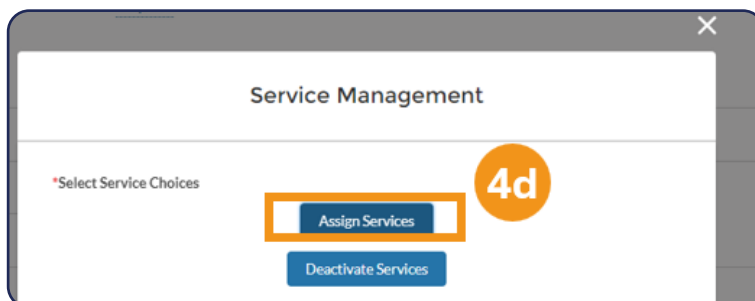


Asset: Next Generation LLC - CEND

Account: [Next Generation LLC](#) | Contact: | Product: [CSS Event Notification Delivery \(CEND\): Population Explorer](#) | Status: Active | Install Date: 10/9/2024

DETAILS | RELATED

Asset Name	Next Generation LLC - CEND	Status	Active
Account	Next Generation LLC	Install Date	10/9/2024
Usage End Date		Deactivation Reason	



Service Management

*Select Service Choices

[Assign Services](#) [Deactivate Services](#)

7. Provisioning Services for Single and Multiple

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 next to their name

5b. 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.

Search for Users by Name

	☐	Name	Email
1	☐	Aalnerer1 chesington1	aalnerer1chesingt...
2	☒	Aalnerer10 chesington10	aalnerer10chesingt...
3	☐	Aalnerer100 chesington100	aalnerer100chesingt...
4	☒	Aalnerer101 chesington101	aalnerer101chesingt...

Page 1 of 10. Showing 1 to 50 of 488 records.

5a **5b** 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

Assign Service

Assign Snapshot Service

Select Access ✓ Confirm Selections Complete!

Assign the following Access:

- HIE Portal

To the following Users:

Search for Users by Name

	☐	Name	Email	Member Title
1	☐	Aalnerer10 chesington10	aalnerer10chesingt...	
2	☐	Aalnerer11 chesington11	aalnerer11chesingt...	
3	☐	Aalnerer13 chesington13	aalnerer13chesingt...	
4	☐	Aalnerer101 chesington101	aalnerer101chesingt...	

Previous **6a** **6b** Complete!

Assign Service

Assign Snapshot Service

Select Access ✓ ✓ Complete!

Success!

6c 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

The screenshot displays the HIE Admin tool interface. The top navigation bar includes links for HOME, ACCOUNTS, USERS, ADD USERS, and USER GUIDE & HELP. The main content area is titled 'All Contacts' and features a search bar labeled '1a' with the text 'user account' entered. Below the search bar is a table with columns: Name, Account Name, Member Title, Email, Phone, and Status. The table contains one row with the following data: Name: User Account, Account Name: Junior Smoke Test, Member Title: Scribe, Email: useraccounts@crisps..., Phone: 111111111, Status: Active. The table is paginated, showing 'Page 1 of 1' with 'Previous' and 'Next' buttons. The bottom section is titled 'HIE Admin - User Audit Page' and includes a search bar labeled '1b'. Below the search bar are two tabs: 'Active User' and 'Suspended User'. The 'Active Users' tab is selected, and the 'Approve All' button is visible at the bottom right.

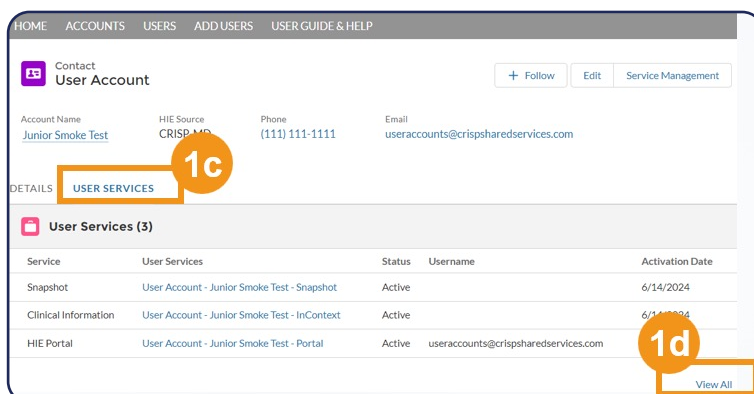
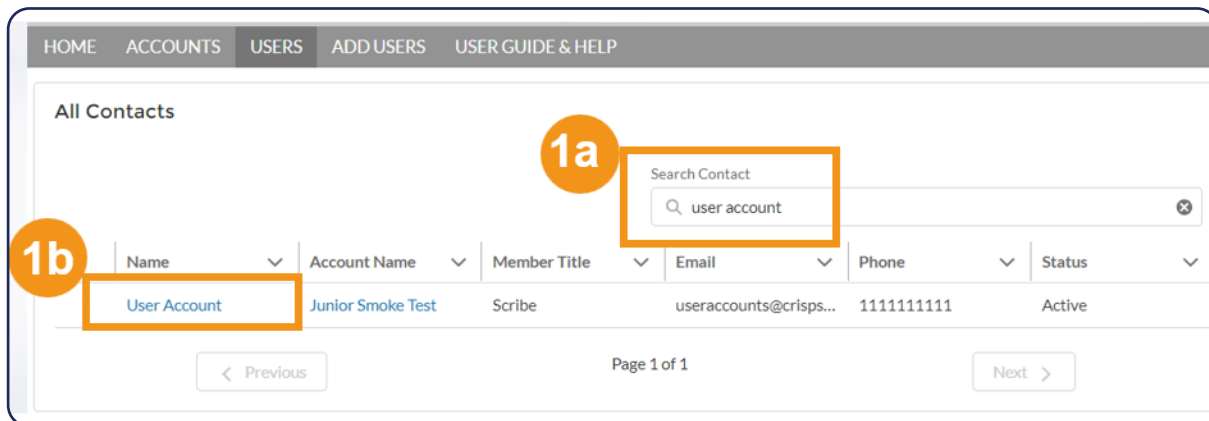
10. Password/Activation Email Reset



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



5. Creating Individual Users

10.1 User Password or Activation Email Reset (cont.)

DETAILS USER SERVICES				
 User Services (3)				
Service	User Services	Status	Username	Activation Date
Snapshot	User Account - Junior Smoke Test - Snapshot	Active		6/14/2024
Clinical Information	User Account - Junior Smoke Test - InContext	Active		6/14/2024
HIE Portal	User Account - Junior Smoke Test - Portal	Active	useraccounts@crispsharedservices.com	6/14/2024

[View Less](#)

Asset
Plum10 Fruit10 - Next Generation LLC - Portal

Account: Next Generation LLC
Contact: Plum10 Fruit10
Product: HIE Portal
Status: Active
Install Date: 6/22/2022

DETAILS RELATED

Plum10 Fruit10 - Next Generation LLC - Portal

Account: Next Generation LLC

Product: HIE Portal

1f [HIE Portal User Management](#)

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.

1h [Confirm Reset](#)

[Cancel](#)

1g **HIE Portal User Management**

[Reset Password](#)

[Resend Activation Link](#)

[Cancel](#)

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

The screenshot shows the 'USERS' tab selected in the navigation bar. Below the navigation bar, there is a search bar labeled 'Search Contact' with the text 'user account' entered. Below the search bar is a table with the following columns: Name, Account Name, Member Title, Email, Phone, and Status. The table contains one row with the following data: 1, User Account, Junior Smoke Test, Scribe, useraccounts@crisps..., 1111111111, Active. The table is on page 1 of 1.

	Name	Account Name	Member Title	Email	Phone	Status
1	User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active

11.2 Viewing and Selecting a Contact

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

The screenshot shows the 'USERS' tab selected in the navigation bar. Below the navigation bar, there is a search bar labeled 'Search Contact' with the text 'user account' entered. Below the search bar is a table with the following columns: Name, Account Name, Member Title, Email, Phone, and Status. The table contains one row with the following data: 1, User Account, Junior Smoke Test, Scribe, useraccounts@crisps..., 1111111111, Active. The 'User Account' text in the Name column is highlighted with an orange box. The table is on page 1 of 1.

	Name	Account Name	Member Title	Email	Phone	Status
1	User Account	Junior Smoke Test	Scribe	useraccounts@crisps...	1111111111	Active

11. Editing User Details

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

The screenshot displays the 'Edit Contact' form in the HIE Admin Tool. The contact being edited is 'Ronald Test', associated with 'Jones Practice LLC'. The 'Edit' button is highlighted with a red circle and labeled '3a'. The 'Save' button is highlighted with a red circle and labeled '3b'. The form includes fields for Name, Salutation, First Name, Middle Name, Last Name, Suffix, Account Name, Member Title, Department, and User Status. The 'Save' button is located at the bottom right of the form.

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 User Export on the top right tool bar

1c. Click the Export 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.

The screenshot shows the HIE Admin Tool interface. At the top, there are navigation tabs: HOME, ACCOUNTS, USERS, ADD USERS, and USER GUIDE & HELP. The 'ACCOUNTS' tab is selected, showing a list of accounts. The first account, 'Jones Practice LLC', is highlighted, and a red box labeled '1a' is around its name. Below the list, there are tabs for 'DETAILS', 'ACTIVE USERS', 'SUSPENDED USERS', 'PANELS', and 'SERVICES'. The 'DETAILS' tab is selected, showing the account information for 'Jones Practice LLC'. A red box labeled '1b' is around the 'User Export' button in the top right corner. Below the account information, there is a 'User Export' dialog box. A red box labeled '1c' is around the 'Export' button in the dialog box. The dialog box contains the text: '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.'

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

Account Name	Website	Industry
Interstellar LLC		Ambulatory Medical

Account Name	Active Users	Suspended Users	PANELS	SERVICES
Account Name				Account Owner

Account Name	Website	Industry	Account Owner
Interstellar LLC		Ambulatory Medical	

Account Name	Website	Industry	Account Owner
Interstellar LLC		Ambulatory Medical	

RHODE ISLAND HIE



[RIHIE.org](https://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