HIE Admin Tool

WVHIN Technical User Support Team:

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WEST VIRGINIA HEALTH INFORMATION NETWORK

What is an HIE Admin?

A Health Information Exchange (HIE) Admin is a designated person responsible for adding new users for WVHIN access, assigning WVHIN services to their users, and **auditing each user every 90 days**.

***If a user is not audited within 90 days, their WVHIN access will be suspended; after another 90 days, they will be deactivated. We recommend setting a calendar reminder to avoid missing your deadline.*

HIE Admin Responsibilities

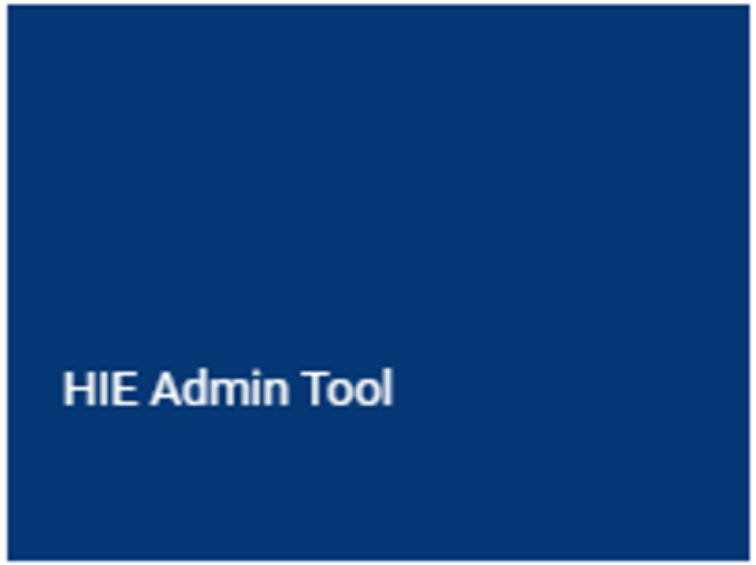
USER MANAGEMENT	AUDITING USERS	PROVISIONING SERVICES
Create Users	Auditing Active Users	Assign Services to Users
Deactivate Users	Auditing Suspended Users	Deactivate Services to Users
Reactivate Suspended Users		
Reset User's Password		
Resend User Activation Link		

Accessing the Tool

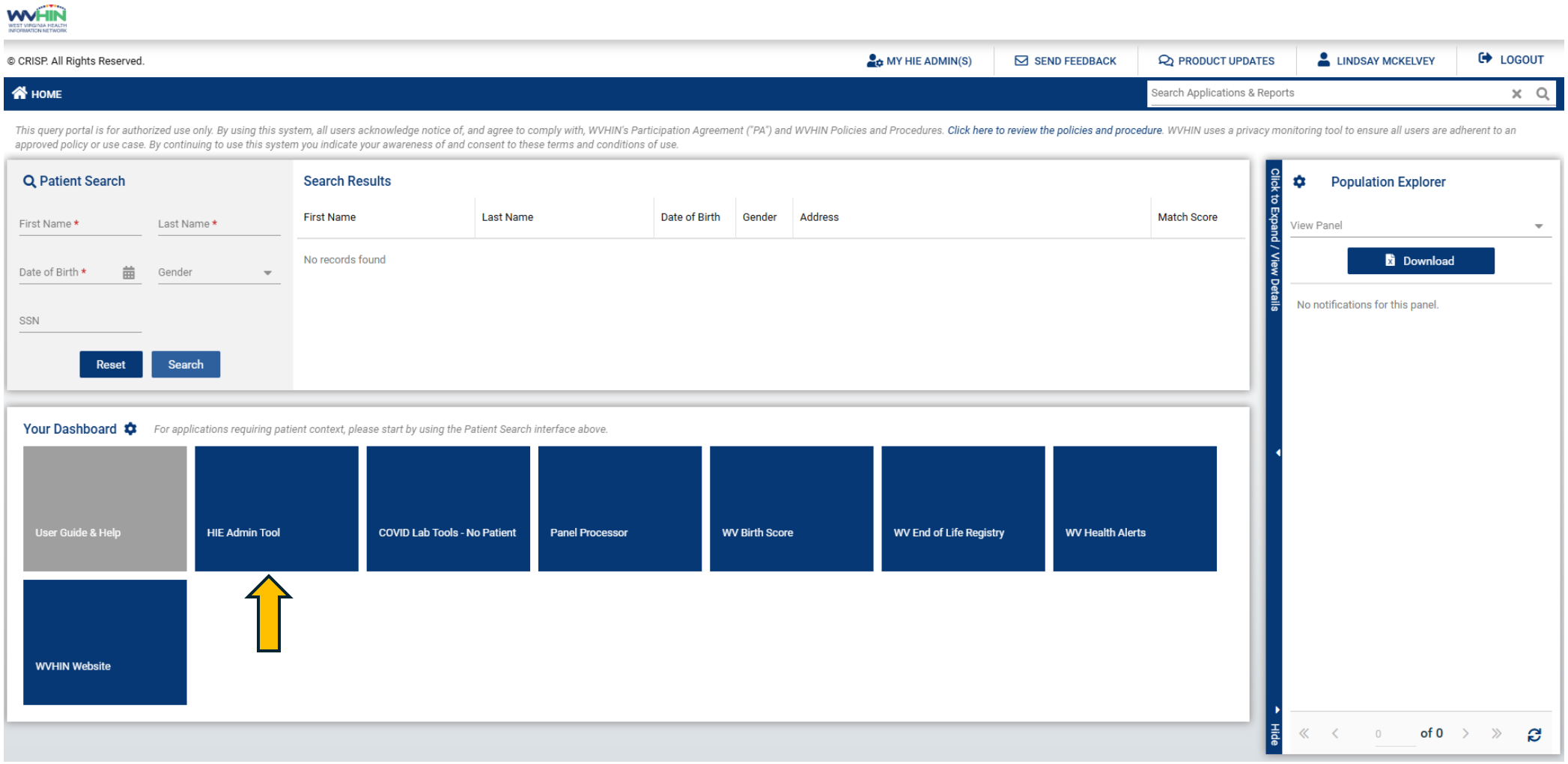
First Time HIE Admin Users:

- 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

WV users – Log on to https://portal.wvhin.org and select the "*HIE Admin Tool*" tile:

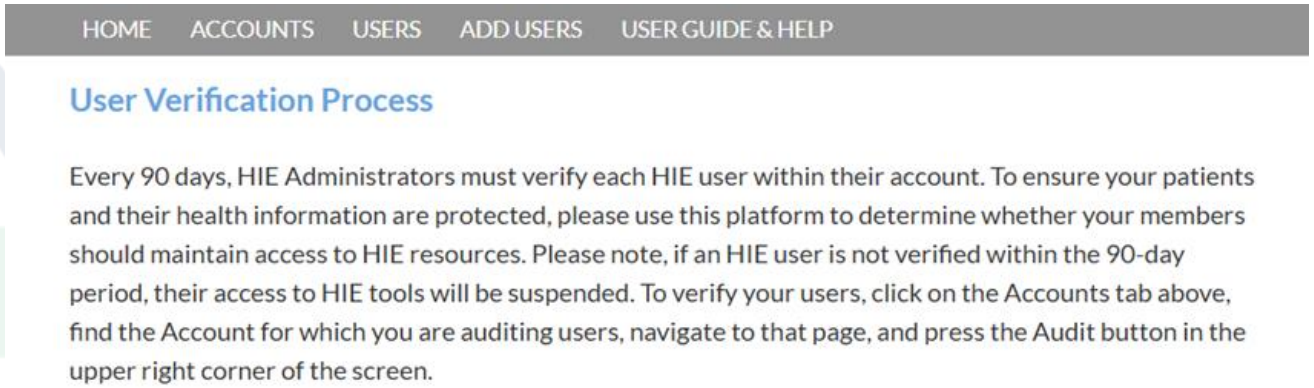


WVHIN Dashboard



Home Screen/Landing Page

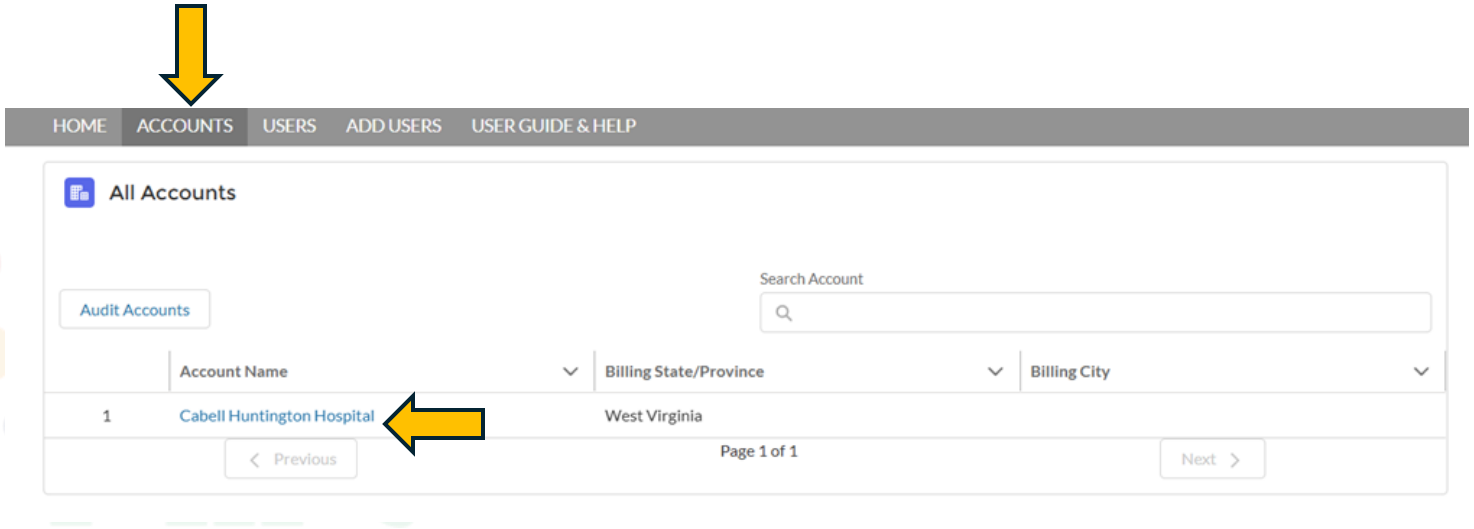
- Every 90 days, HIE Administrators must verify each HIE user within their organization
- To ensure your patients and their health information are protected, please use this platform to determine whether members of your organization should maintain access to HIE resources
- Please note, if an HIE user is not verified within the 90-day period, their access to HIE tools will be suspended



****After 180 days, the user's status will be deactivated. Please contact Technical User Support (TUS) to reactivate them.*

Auditing Users

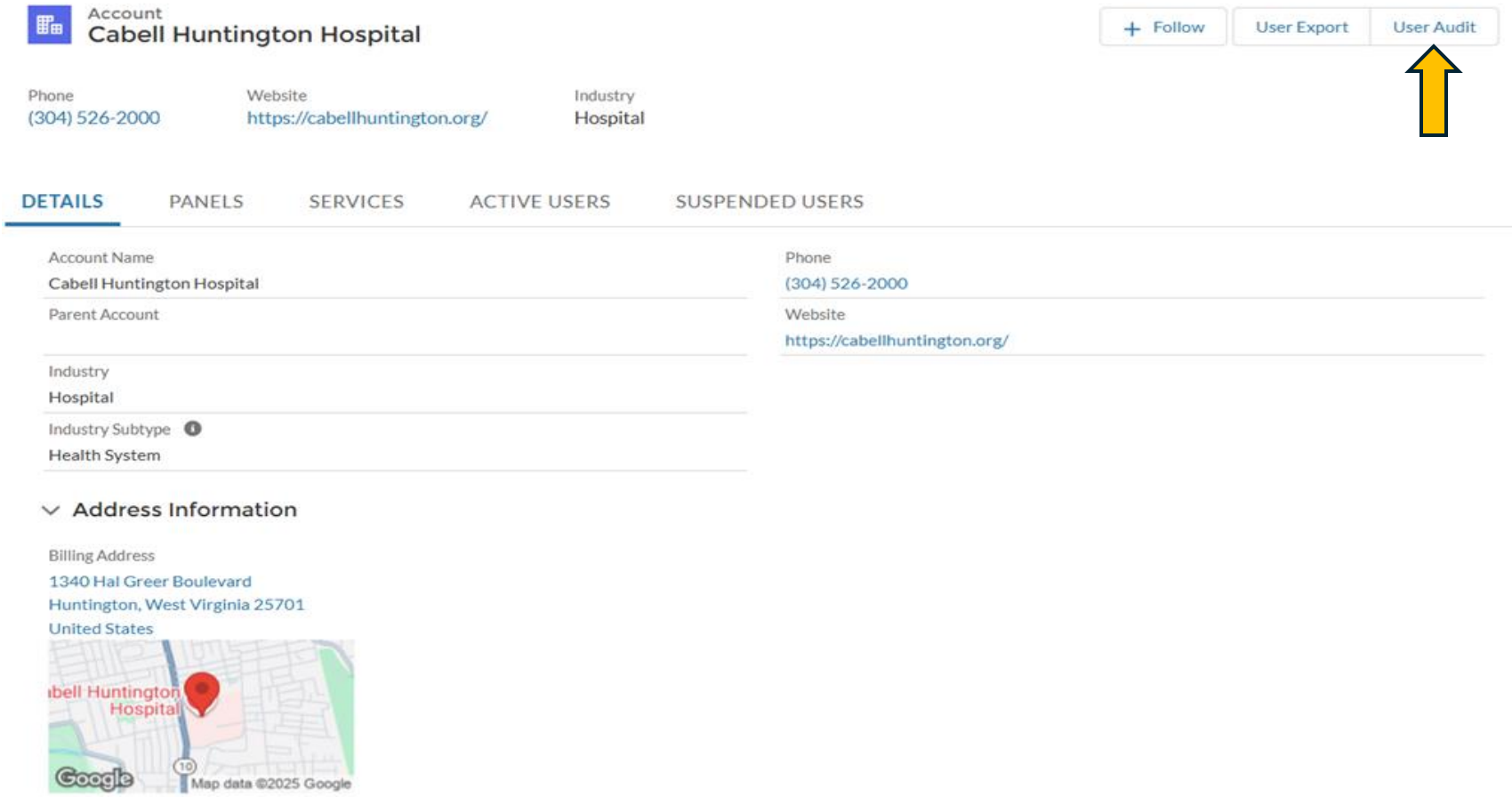
- Select the 'Accounts' tab
- Select the account you wish to audit



**Please note: Some HIE Admins will have multiple accounts to audit.*

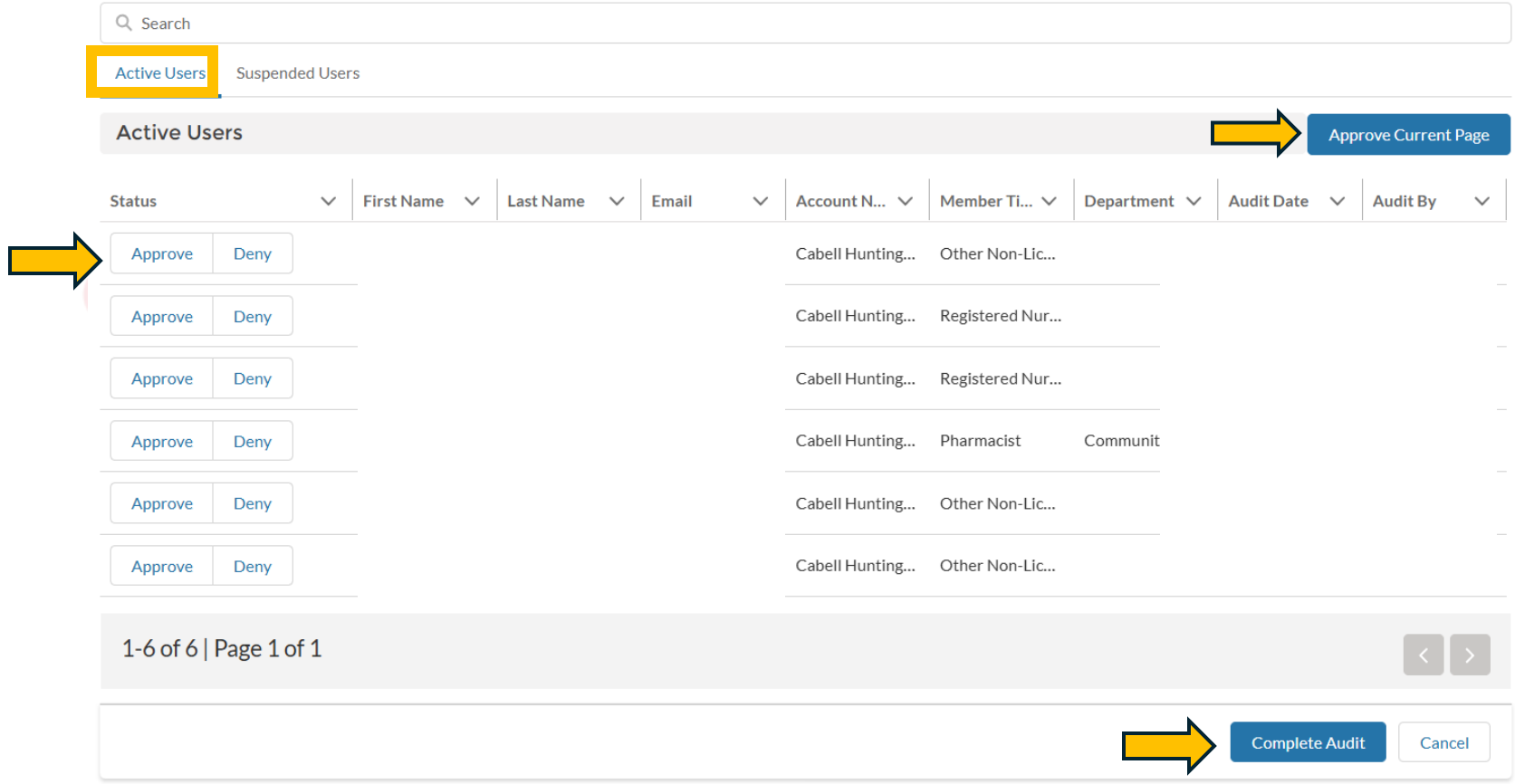
Auditing Users

When you click the 'Accounts' tab, it takes you to this page. Select 'User Audit' in the top right of the screen to begin the audit process.



Auditing Users: Active Users

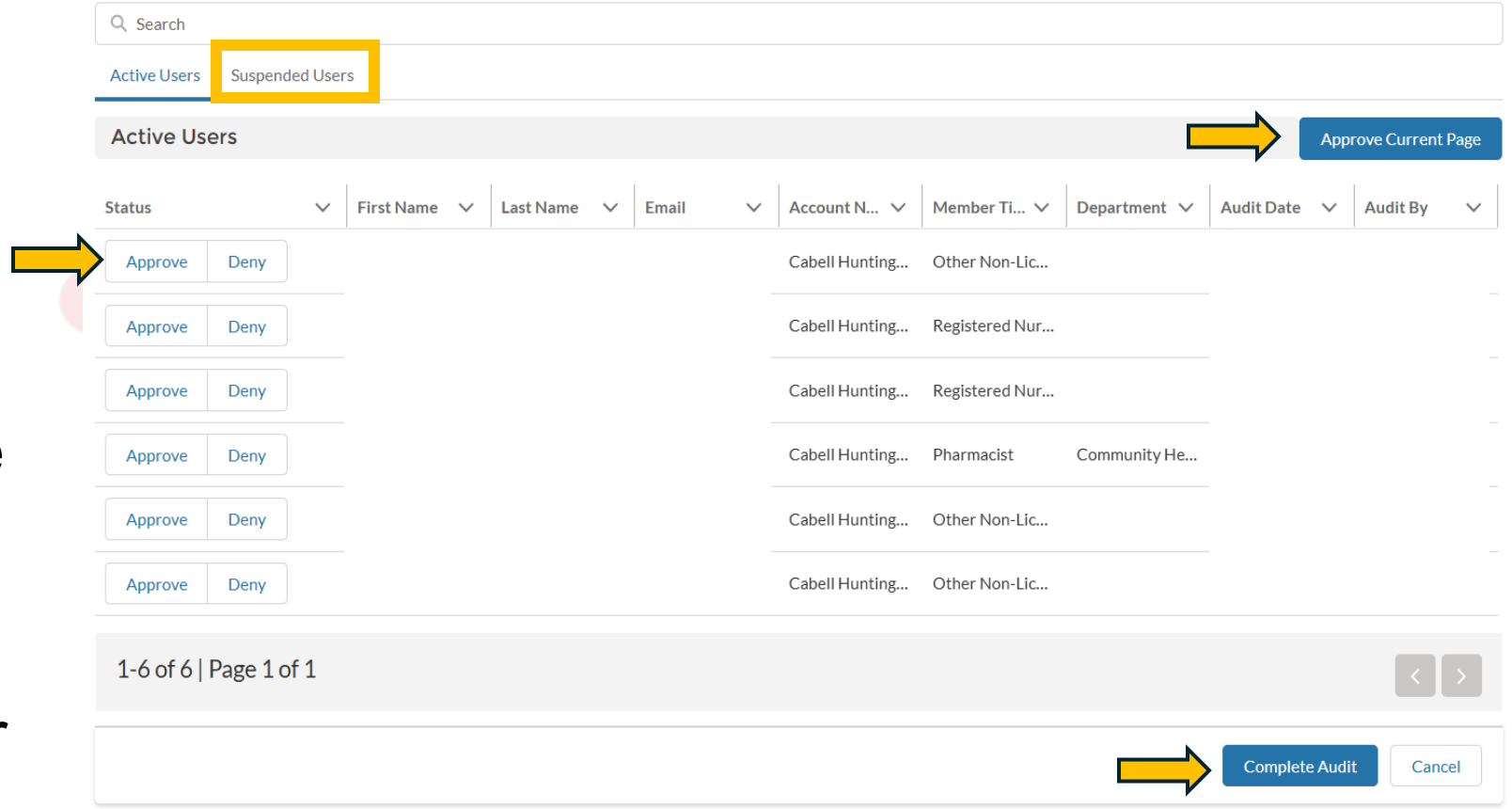
- To audit all users at once, select 'Approve Current Page' at the top right or individually approve or deny individual users to the left
- After that, select 'Complete Audit' at the bottom right
- It will then direct you to a page to confirm that the audit was completed



3.

Auditing Users: Suspended Users

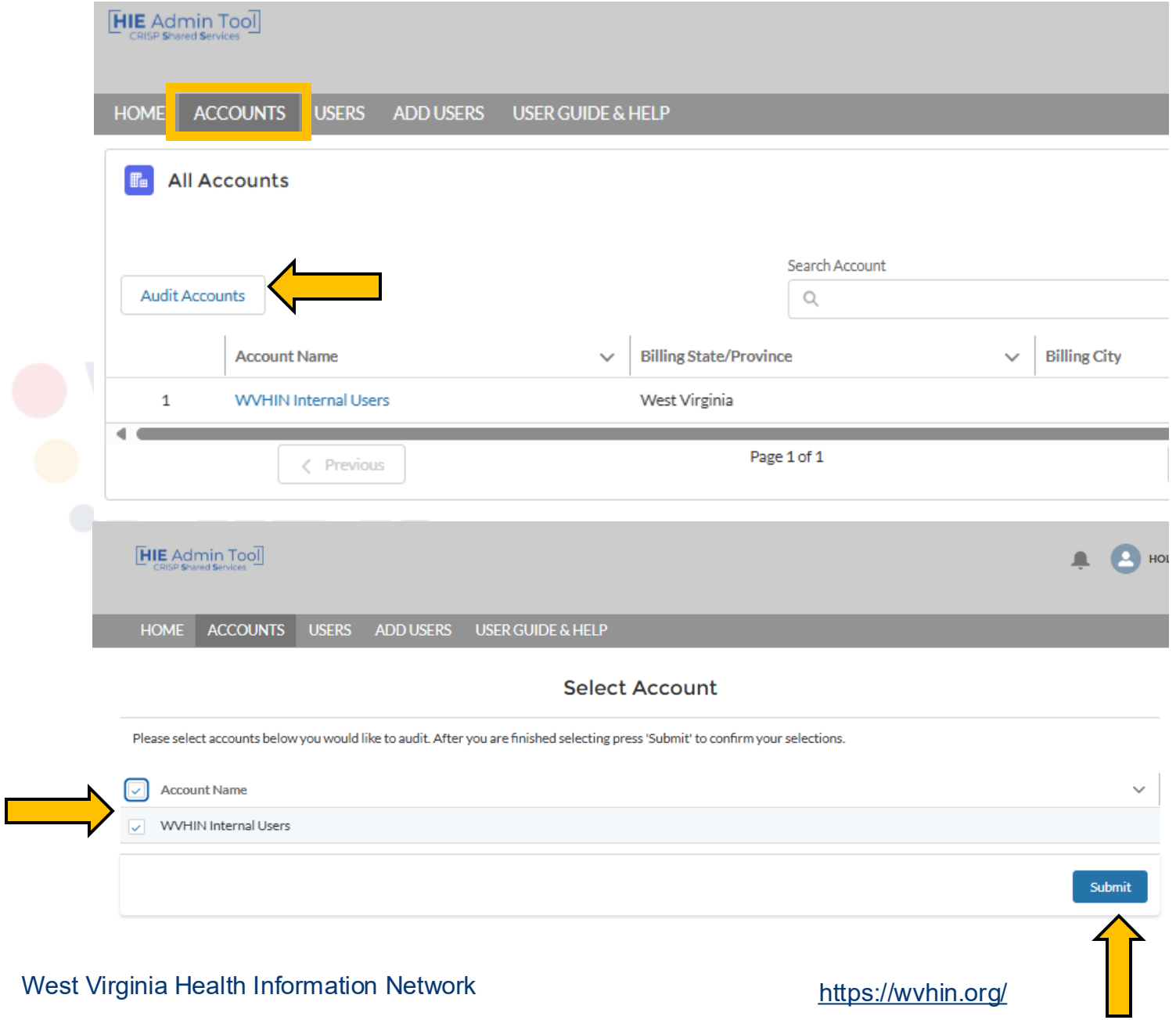
- Use the same practice to audit/approve users in the 'Suspended Users' tab
- To remove an employee that is no longer with your organization or no longer needs WVHIN access, select 'Deny' for that user



3.

Auditing Users from All Accounts

- Go to the Accounts tab
- Click 'Audit Accounts'
- Select either the box next to 'Account name' to select all accounts or select the boxes next to the account you want to audit
- Click 'Submit' at the bottom right to complete the audit

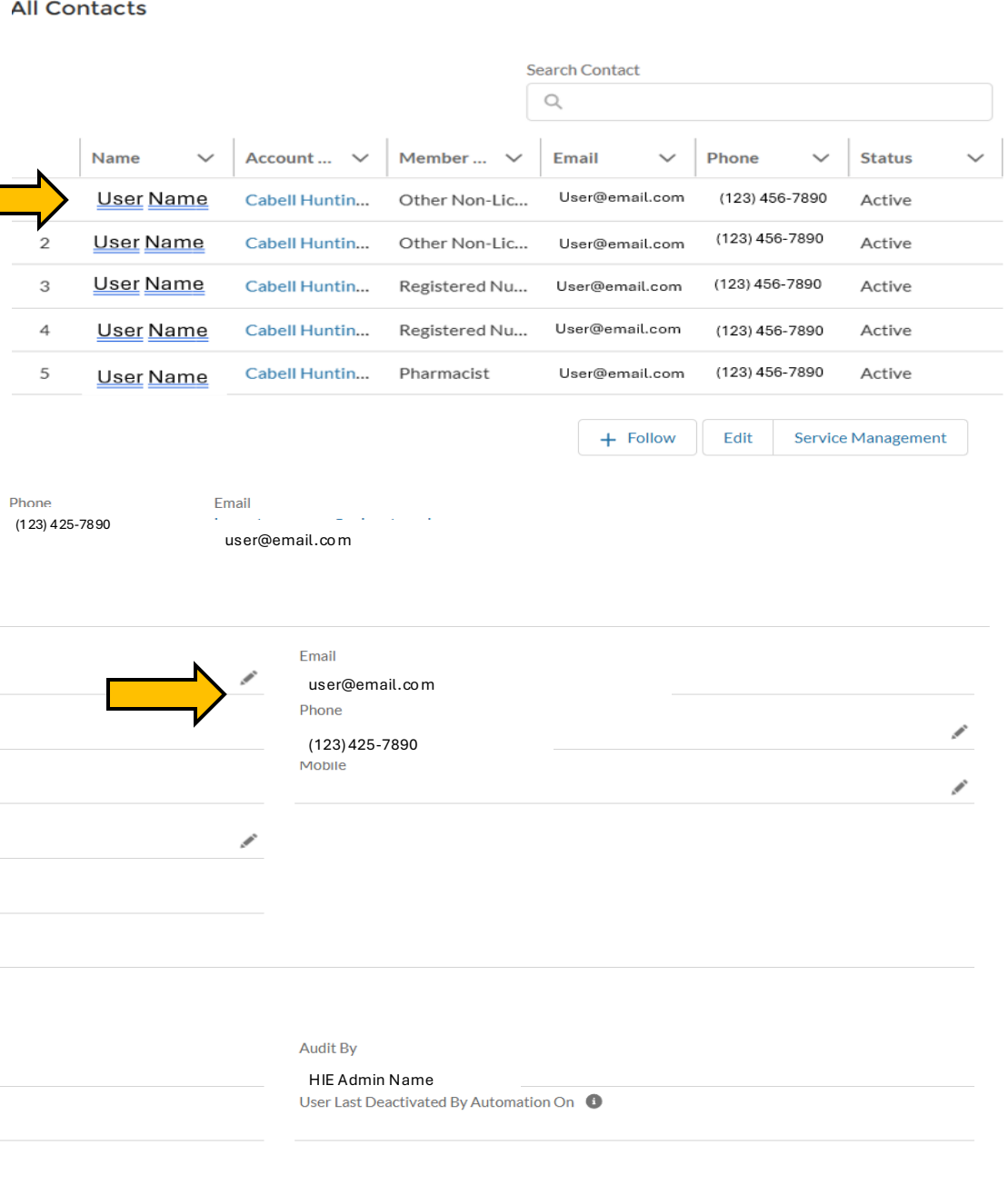


Managing Users

The **Users tab** provides a list of all your users, their status, and the option to edit their information.

- Select the user's name to edit their information
- HIE Admins may edit any fields that have a pencil icon next to it

Note: If a user has an email address change, the HIE Admin will need to deny that user's account and credential the user for a **new** WVHIN account with the new email address.



Managing Users

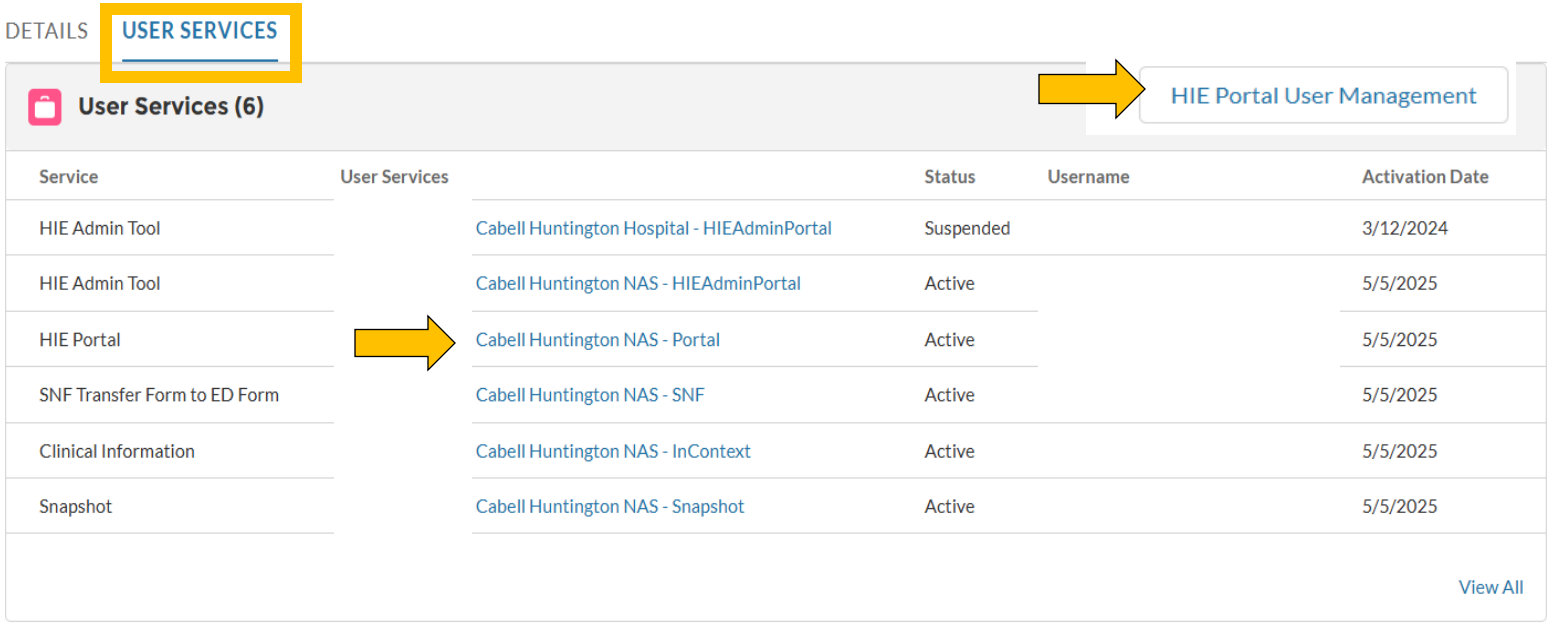
User Services shares which WVHIN tools have been assigned to each user. If you add a user and they do not activate their account within the 72hr expiration, you will need to resend an activation link. If you have a user who forgot their password, you can reset their password.

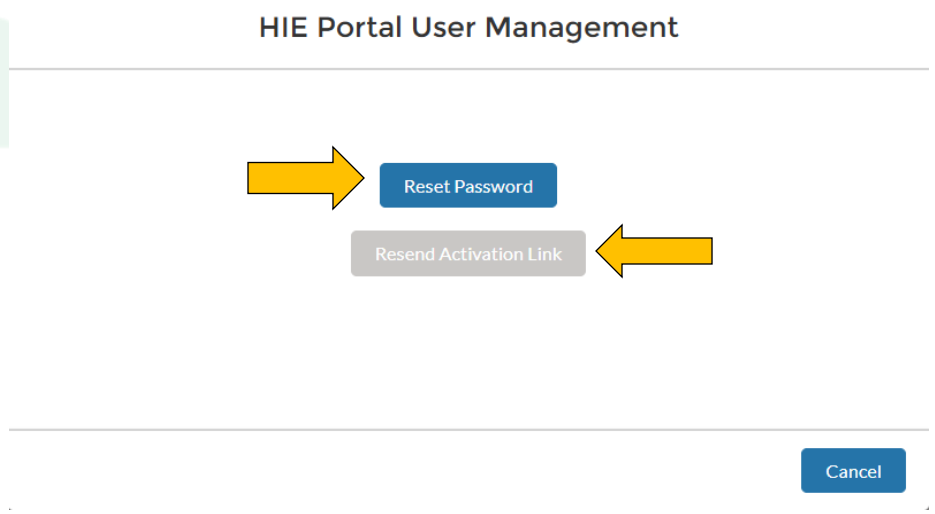
Reactivation Link:

- Select User Name
- Select the 'User Services' tab
- Select 'Account Name – Portal'
- Click 'HIE Portal User Management' in the top right
- Click 'Resend Activation Link'

Reset Password Link:

- Select User Name
- Select the 'User Services' tab
- Select 'Account Name – Portal'
- Click 'HIE Portal User Management'
- Click 'Reset Password'





Adding Users: Single User vs. Bulk User

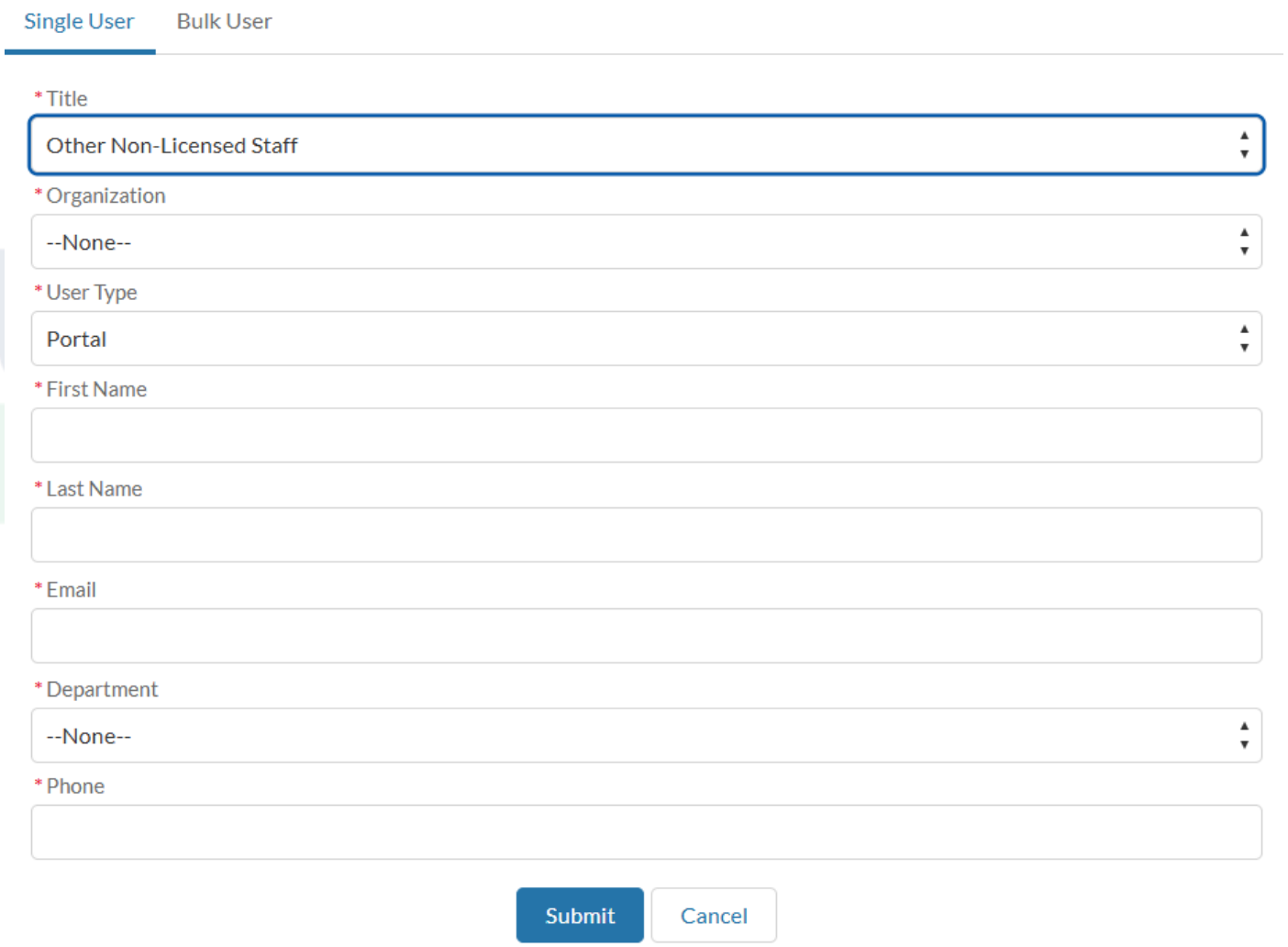
Two ways to add users in the **Add Users tab**:

Single User	Bulk User
1. **Select their title** 2. **Fill out all sections with a red asterisk*** 3. **Click submit** *Note: Depending on their title, the red asterisks may change.*	Instructions are available under **Bulk User** tab: 1. **Download the Bulk User Template** 2. **Save the file as a .CSV (comma delimited)** *- Do not forget this- files will fail if not a .CSV* **3. Select the "Portal" checkbox** **4. Upload your file (must be .CSV)** **5. Select "Create Users"** *Note: The system will identify errors in the file (if any) and notify you of those errors. If you have any issues, please contact your Account Manager and include the Error Message in your email.*

- Depending on how many users you must add, the Bulk User Template allows you to add multiple users at once
- If you have a smaller number of users you are adding to the portal, the Single User tab might be a better option
- If you need assistance, feel free to reach out to your Account Manager

Adding Users: Single Users

- Select the title or closest title to the user you are wanting to add
- Fill out all the sections with a red asterisk. Keep in mind that the required fields change based on the title of the user
- Click 'Submit' and look for a confirmation
- Please notify the user of their WVHIN access so they can be on the lookout for their activation link and activate their WVHIN account within the 72-hour expiration



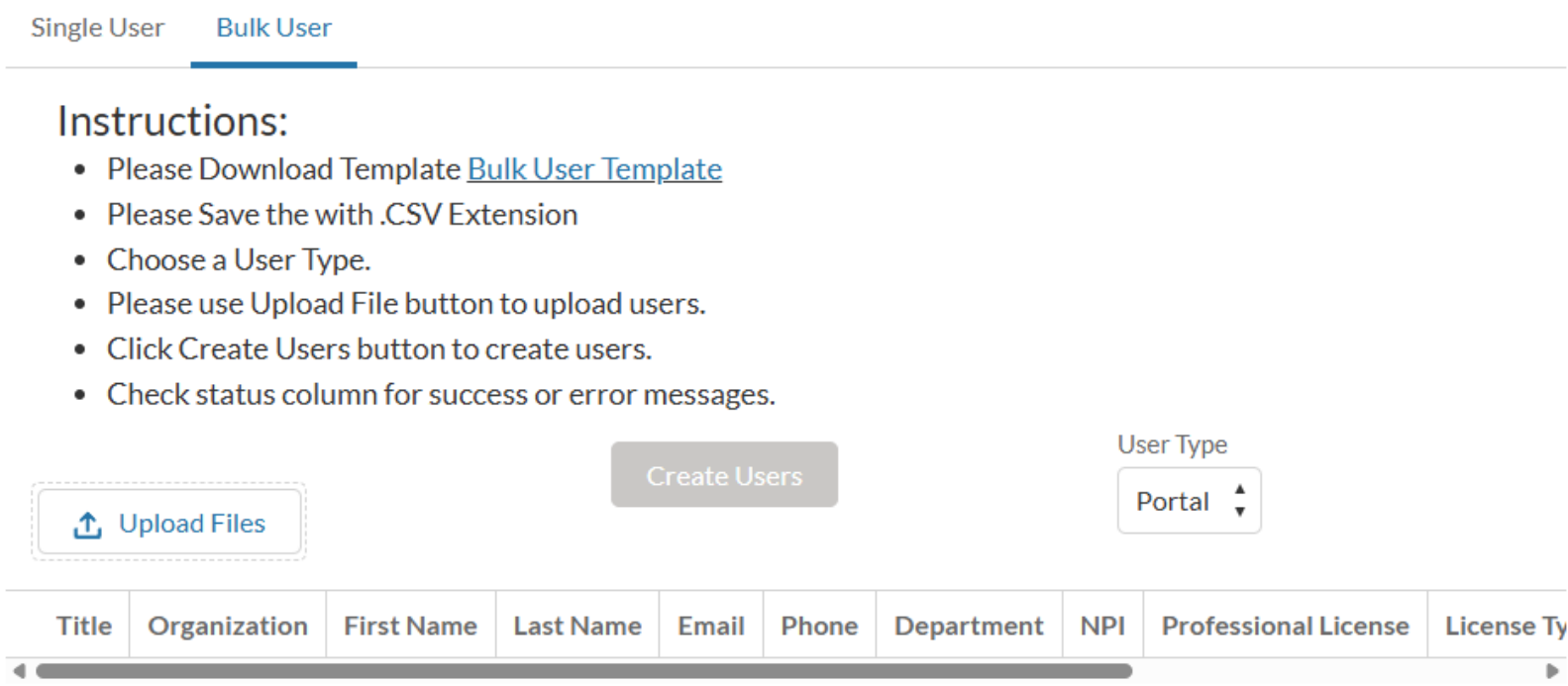
Assigning or Deactivating Services: Single User

- Select the user from the User Tab
- Select 'Service Management' in top right corner
- Select 'Assign Services' or 'Deactivate Services'
- Select the Service you wish to assign or deactivate.
- Click Next and Finish

Adding Users: Bulk User Upload

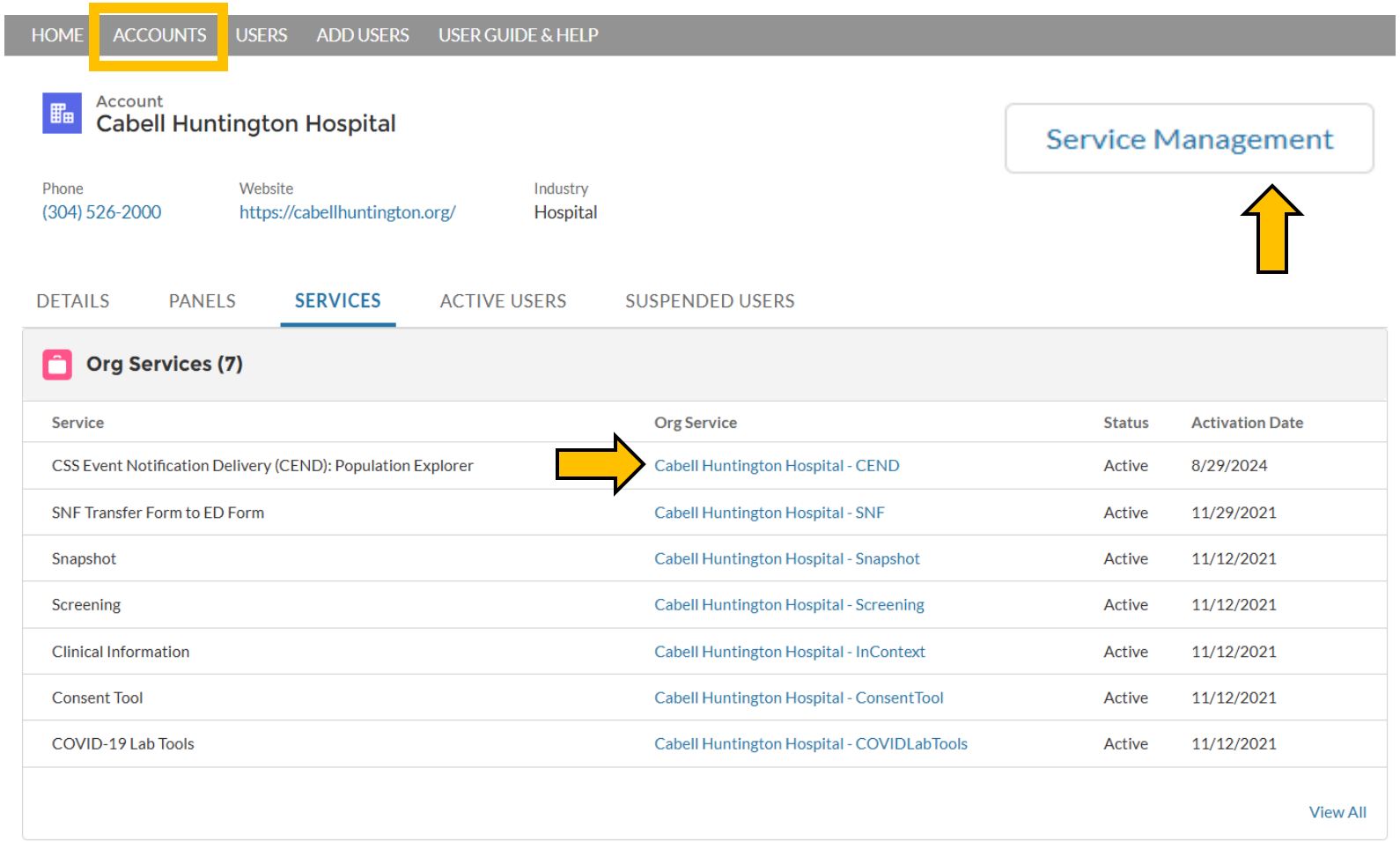
Tips for Success:

- This is file is case-sensitive.
- Do not move or edit the headers.
- The organization name must be listed the same as in the portal—no abbreviations/spelling errors.
- The department field is also case sensitive and must be one of the departments listed in the single user drop down.
- Save the file as a comma delimited (.CSV) file.
- Please let your account managers know if you have any error messages or issues uploading your users using this method.



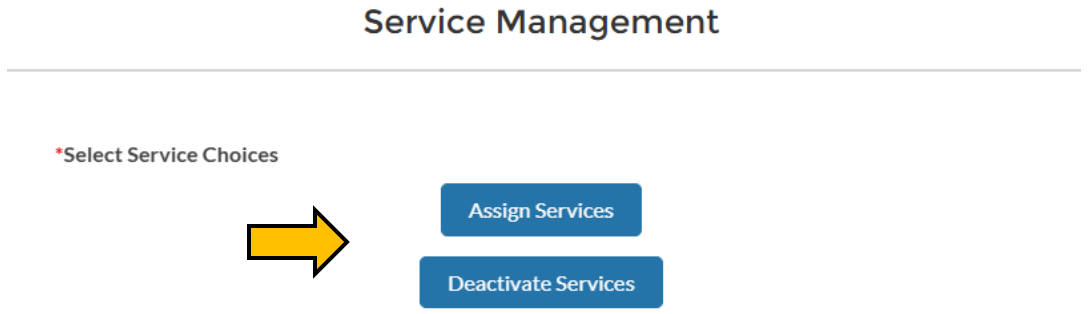
Assigning or Deactivating Services: Multiple Users

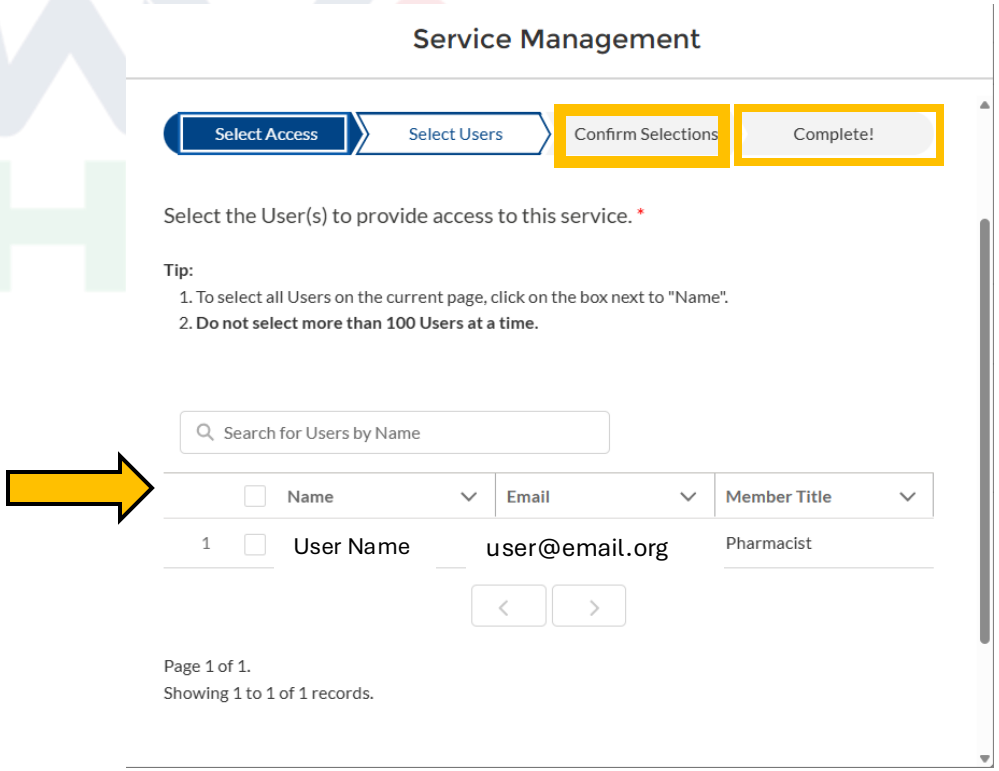
- Click on the 'Accounts' tab
- Select the organization/account name that you want to assign or deactivate user services for
- Select the 'Organization Service' you want to assign or deactivate
- Each service must be selected separately
- Click on 'Service Management'



Assigning or Deactivating Services: Multiple Users

- Select 'Assign Services' or 'Deactivate Services'
- Select (or search for) the names of the users you want to assign services to
- Confirm your selections
- The next page will confirm that you have completed assigning those services





Thank you for joining!

Visit our website, www.wvhin.org, for additional resources and information.

Need Technical Support? Call 1.844.468.5755

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