NC HEALTHCONNEX CLINICAL PORTAL

PARTICIPANT ACCOUNT ADMINISTRATOR REFERENCE GUIDE

NORTH CAROLINA

HEALTH INFORMATION EXCHANGE AUTHORITY (NC HIEA)

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INTRODUCTION

This PAA Reference Guide was developed jointly by the North Carolina Health Information Exchange Authority (NC HIEA) and SAS Institute to assist Participant Account Administrators in supporting their providers and staff in the use of the NC HealthConnex Clinical Portal. Participant Account Administrators are a critically important liaison between the HIEA and the participant health care organization. Additionally, the PAA(s) are the points of contact that have authority to utilize the SAS® HIE Technical Support Team and Help Desk.

Welcome

The Participant Account Administrator's (PAA) roles and responsibilities are as follows:

- Serve as the main contact to receive questions and communications from the NC HIEA, including encouraging access and use of NC HealthConnex for health care operations and patient treatment,
- Manage creation and deactivation of user accounts for the clinical portal and DSM,
- Act as the point person for providers and staff who have questions about NC HealthConnex, including forwarding training opportunities via the quarterly TeleTown Hall and scheduling training for their organization upon request,
- Update NC HealthConnex with address and staff changes,
- Ensure the participating entity list (health care organization's participating facilities) is up to date and accurate, and
- Complete and return quarterly user account audit.

CLINICAL PORTAL – USER ACCOUNT MANAGEMENT

Levels of Access and Responsibilities Overview

Access to the NC HealthConnex Clinical Portal is granted to clinicians and other users that provide patient care in a variety of settings, including offices, clinics, emergency departments, hospitals and others.

Different types of providers and health care staff will be assigned levels of access to the information within the NC HealthConnex Clinical Portal based on appropriateness to their role(s) and responsibilities in the patient care process per HIPAA. These are called "role-based permissions."

Role-Based Permissions

The NC HealthConnex Clinical Portal is configured with various views and functionality that end users can access. Not all views need to be accessed by all users, and access is based on sensitivity of information and relevance to the user. User group "levels" are used to control this access and are broadly defined as follow.

Level	Description	Common Examples
%HS_Clinician	This level of access is assigned to a credentialed health care provider or someone who works under a credentialed health care provider to provide patient care functions.	• Physician • Physician Assistant • Nurse Practitioner • Nurse • Resident or Intern • Therapist • Pharmacist • Medical Records • Medical Assistants
%HS_Clerical	This level of access is assigned to a user who may access the Clinical Portal to search for patients and verify demographics. This level of user may not access clinical data.	• Practice Manager • Administrator • Billing Clerk • Registration Staff
%HS_PAA User Administrator	This level of access is assigned to a user who maintains NC HealthConnex Clinical Portal end user accounts for their organization, including password management. This level of user may not access any patient data.	• Participant Account Administrator (PAA) • Healthcare Organization (HCO) Staff

%HS_NCNotify	This level of access is assigned to a user who *only* needs access to **view** patient notification/alerts within the NC*Notify Dashboard in the clinical portal. This level does not give permission for the user to access any other clinical data in the clinical portal.	• Care Team Member • Practice Manager • PAA • Nurse • Physician
%HS_NCNotify_SSPL	This level of access is assigned to a user who maintains the NC*Notify patient panel for their organization. The user will be able to upload a patient panel within the clinical portal. This level does not give permission for the user to access any other clinical data in the clinical portal, including viewing notifications.	• Care Team Member • Practice Manager • PAA • Nurse • Physician

Role Combinations

A user may have one of the roles specified in the above table or a user may be assigned a combination role below.

%HS_Clinician & %HS_PAA User Administrator
%HS_Clinician & %HS_NCNotify
%HS_Clinician & %HS_NCNotify_SSPL
%HS_Clinician & %HS_PAA User Administrator & %HS_NCNotify
%HS_Clinician & %HS_PAA User Administrator & %HS_NCNotify & %HS_NCNotify_SSPL
%HS_Clinician & %HS_NCNotify & %HS_NCNotify_SSPL
%HS_PAA User Administrator & %HS_NCNotify
%HS_PAA User Administrator & %HS_NCNotify_SSPL
%HS_PAA User Administrator & %HS_NCNotify & %HS_NCNotify_SSPL
%HS_Clerical & %HS_NCNotify
%HS_Clerical & %HS_NCNotify_SSPL
%HS_Clerical & %HS_NCNotify & %HS_NCNotify_SSPL
%HS_Clerical & %HS_ PAA User Administrator
%HS_Clerical & %HS_ PAA User Administrator & %HS_NCNotify
%HS_Clerical & %HS_ PAA User Administrator & %HS_NCNotify_SSPL
%HS_Clerical & %HS_ PAA User Administrator & %HS_NCNotify & %HS_NCNotify_SSPL
%HS_NCNotify & %HS_NCNotify_SSPL

A full list of the types of Clinical Portal functionality and information accessible to each user level is provided below.

Clinical Portal Functionality	Clinician	Clerical	PAA User Admin	Clinician & PAA Admin
View Clinical Portal Home Page	X	X		X
View User Administration Home Page			X	X
Search for Patients	X	X		X
View Recent Patients	X	X		X
Break the Privacy Seal (Patient Level Access)	X			X
View Demographics	X	X		X
View Encounter History	X			X
View Allergies	X			X
View Medication History	X			X
View Problems	X			X
View Procedures	X			X
View Lab & Pathology Results	X			X
View Radiology Reports	X			X
View Clinical Documents	X			X
View Continuity of Care Documents	X			X
Access NC*Notify Dashboard **Additional enrollment steps required.*	X	X	X	X
Search CSRS **Additional enrollment steps required.*	X		X	X

COMBINATION ROLES

Additional roles can be added to any user.

Please note: Additional steps are required for those users who would like the roles below:

- **NC*Notify** (Viewing Notifications)
  - %HS_NCNotify
  - See section, "ADDING THE NC*NOTIFY "VIEWING NOTIFICATIONS" ROLE
- **NC*Notify** (Upload Panel)
  - %HS_NCNotify_SSPL
  - See section, "ADDING THE NC*NOTIFY "UPLOAD PANEL" ROLE
- **Controlled Substance Reporting System (CSRS)**
  - See section, "Adding the CSRS Role"
    - This user must also be assigned %HS_Clinician

NC*Notify

Adding the NCNotify role allows the user to access patient alerts/notifications via the NC HealthConnex Portal.

Adding the NCNotify_SSPL role allows the user to maintain the patient panel for their organization through the NC HealthConnex Clinical Portal.

Controlled Substance Reporting System

Health care providers in North Carolina who prescribe controlled substances must access a patient report from the CSRS to verify a patient's prescription-fill history of controlled substances prior to writing prescriptions for targeted controlled substances.

The CSRS role allows the user already accessing the patient's longitudinal record within the NC HealthConnex clinical portal, to view the CSRS report along with the risk scores without leaving the NC HealthConnex portal. This role will help providers meet the Strengthen Opioid Misuse Prevention (STOP) Act requirement.

*Your organization must complete the access request process with DHHS prior to requesting access on the NC HealthConnex user management spreadsheet.

For more information and instructions on how to register, please visit the following URL: https://hiea.nc.gov/services/controlled-substance-reporting-system.

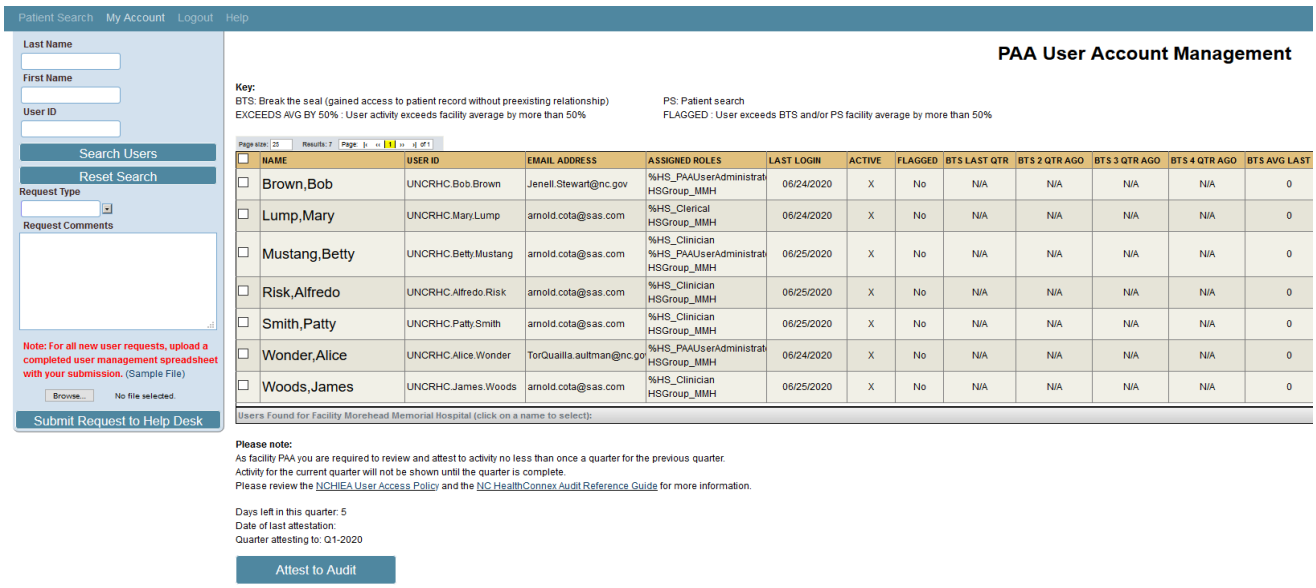
PAA PORTAL USER INTERFACE

The NC HealthConnex Clinical Portal user interface refers to the menus, icons, buttons, and other user information on the various screens that help a user interact with the application.

PAA User Account Management Home Page

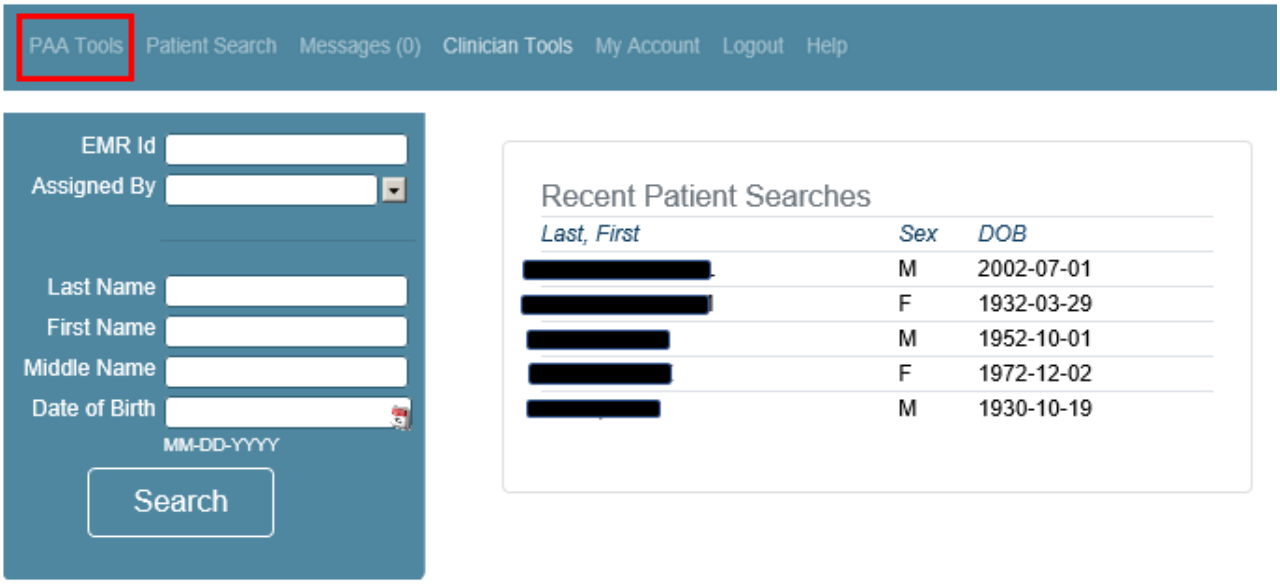
- Participant Account Administrators have a home page designed to assist them in the management of their user accounts. A PAA who has been assigned the role of **HS_%PAAUserAdministrator**, will automatically land on the **PAA User Account Management** home page.
  - **My Account:** This link takes you to your user profile, where you can update your password and other account details.
  - **Logout:** This link logs you out of the Clinical Portal.
  - **Help:** This link opens a new window or tab on the user's web browser to the Training & Tools section of the NC HIEA website. Here a user may access Clinical Portal video tutorials, help with Clinical Portal credentials, and other tools and information related to the Clinical Portal.

The **PAA User Account Management** home page is shown below.



NAME	USER ID	EMAIL ADDRESS	ASSIGNED ROLES	LAST LOGIN	ACTIVE	FLAGGED	BTS LAST QTR	BTS 2 QTR AGO	BTS 3 QTR AGO	BTS 4 QTR AGO	BTS AVG LAST
Brown,Bob	UNCRHC.Bob.Brown	Jenell.Stewart@nc.gov	%HS_PAAUserAdministrat HSGroup_MMH	06/24/2020	X	No	N/A	N/A	N/A	N/A	0
Lump,Mary	UNCRHC.Mary.Lump	arnold.cota@sas.com	%HS_Clerical HSGroup_MMH	06/24/2020	X	No	N/A	N/A	N/A	N/A	0
Mustang,Betty	UNCRHC.Betty.Mustang	arnold.cota@sas.com	%HS_Clinician %HS_PAAUserAdministrat HSGroup_MMH	06/25/2020	X	No	N/A	N/A	N/A	N/A	0
Risk,Alfredo	UNCRHC.Alfredo.Risk	arnold.cota@sas.com	%HS_Clinician HSGroup_MMH	06/25/2020	X	No	N/A	N/A	N/A	N/A	0
Smith,Patty	UNCRHC.Patty.Smith	arnold.cota@sas.com	%HS_Clinician HSGroup_MMH	06/25/2020	X	No	N/A	N/A	N/A	N/A	0
Wonder,Alice	UNCRHC.Alice.Wonder	TorQuailla.aultman@nc.go	%HS_PAAUserAdministrat HSGroup_MMH	06/24/2020	X	No	N/A	N/A	N/A	N/A	0
Woods,James	UNCRHC.James.Woods	arnold.cota@sas.com	%HS_Clinician HSGroup_MMH	06/25/2020	X	No	N/A	N/A	N/A	N/A	0

- If a PAA is also a Health Professional and is assigned the role of **%HS_PAAUserAdministrator&%HS_Clinician**, s/he will automatically land on the home page designed for Clinician access, as shown below.
  - To reach the PAA screen from the Clinician home page, click on the **PAA Tools** option in the top left section of the menu bar.



EDITING, ADDING & DEACTIVATING USER ACCOUNTS

EDITING OR DEACTIVATING AN EXISTING USER

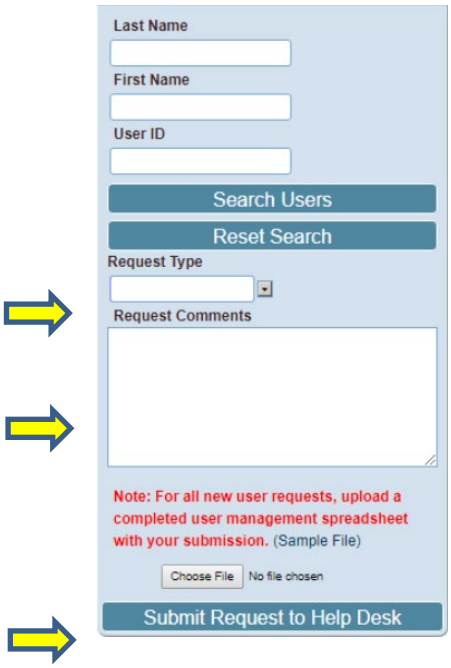
- To edit or deactivate an existing user, put a check beside the user you would like to update. You may search a user by entering the Last Name and First Name into the appropriate fields and clicking **Search Users**.

PAA User Account Management

Page size: 25 Results: 9 Page: 1 of 1

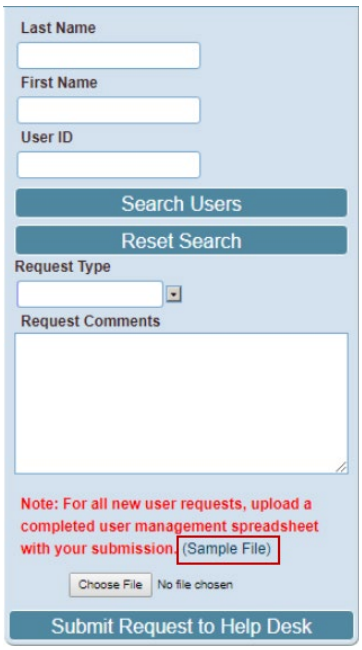
	NAME	USER ID	EMAIL ADDRESS	ASSIGNED ROLES	LAST LOGIN	ACTIVE
☑	Demo,Admin	DemoAdmin	admin.demo@hiea.com	%HS_PAAUserAdministrato	03/21/2019	X
☐	Demo,AdminClin	DemoAdminClin	adminclin.demo@hiea.com	%HS_Clinician,%HS_PAAU	03/21/2019	X
☐	Demo,Clerical	DemoClerical	mmacgregor@j2interactive.	%HS_Clerical,HSGroup_UN	03/18/2019	X

- Select your request type and enter your request into the **Request Comments** field. Click **Submit Request to Help Desk** to send your request to the NC HIEA Help Desk team.



CREATING NEW USER PORTAL ACCOUNTS

- To create new user accounts for health professionals in your facility, you will need to complete the following fields in the User Management spreadsheet. If you need the spreadsheet template, please download it using the "Sample File" link on the PAA User Account Management home page or reach out to the HIEA Help Desk Team at HIESupport@sas.com .



	A	B	C	D	E	F	G	H	I	J
1	Facility	Facility Code	Roles	User ID	Last Name	First Name	Suffix	Email	Description	Enabled
2	North Carolina Health Practice	NCHP	%HS_Clinician	NCHP.John.Doe	Doe	John		John.Doe@hospital.org	Nurse	TRUE

- The spreadsheet will have one row per user.
- If you would like to add a user, add a new row and fill in the values for the required fields listed below.
  - **Facility:** This is the name of your facility or practice. It must match the spelling and format of the legal entity name on your Participation Agreement.
  - **Facility Code:** This is the abbreviation for your facility or practice. If you do not know your facility code, please reach out to the NC HealthConnex Help Desk.
  - **Roles:** Review and choose from the Levels of Access on page 5 of this guide.
  - **User ID:** This is the desired user ID for new users, or the existing user ID for current users. This field is very important as it is used to make matches for updating existing users and for creating new users. Note that the format must follow <ABC>.<First>.<Last> ex. ABC.John.Doe.
  - **Last Name:** Last name of user
  - **First Name:** First Name of user
  - **Suffix:** Suffix for the user, if applicable
  - **Email:** The primary work email address for the user.
  - **Description:** A text description of the user's role (nurse, front office staff, physician)
  - **Enabled:** Account is enabled, TRUE or FALSE. If you wish to deactivate a user, ensure the user ID is correct and change the active column value to FALSE

ADDING MORE THAN ONE ROLE

ADDING THE NC*NOTIFY "VIEWING NOTIFICATIONS" ROLE

	A	B	C	D	E	F	G	H	I	J
1	Facility	Facility Code	Roles	User ID	Last Name	First Name	Suffix	Email	Description	Enabled
2	North Carolina Health Practice	NCHP	%HS_Clinician, %HS_NCNotify	NCHP.John.Doe	Doe	John		John.Doe@hospital.org	Nurse	TRUE

- In the Roles column (column C), list the roles separated by a comma (,) as shown above.
  - %HS_NCNotify role can be combined with any other role(s).
- Then, continue to follow the steps listed in the section above, Creating New Portal Accounts.

ADDING THE NC*NOTIFY "UPLOAD PANEL" ROLE

- In the Roles column (column C), list the roles separated by a comma (,) as shown below.
  - %HS_NCNotify_SSPL role can be combined with any other role(s).
- Then, continue to follow the steps listed in the section above, Creating New Portal Accounts.

	A	B	C	D	E	F	G	H	I	J
1	Facility	Facility Code	Roles	User ID	Last Name	First Name	Suffix	Email	Description	Enabled
2	North Carolina Health Practice	NCHP	%HS_Clerical,%HS_NCNotify_SSPL	NCHP.John.Doe	Doe	John		John.Doe@hospital.org		TRUE

ADDING THE CSRS ROLE

****If requesting a CSRS role, at a minimum, the **Clinician** role must also be listed in column C. Please see additional instructions for adding the CSRS role below.*

	A	B	C	D	E	F	G	H	I	J
1	Facility	Facility Code	Roles	User ID	Last Name	First Name	Suffix	Email	Description	Enabled
2	North Carolina Health Practice	HCHP	%HS_Clinician	NCHP.John.Doe	Doe	John		John.Doe@hospital.org	Nurse	TRUE

- Your organization must complete the access request process with DHHS prior to requesting access on the NC HealthConnex user management spreadsheet.
- Once your organization has completed the access request process, a member of our Help Desk team will reach out to assist you in updating the user management spreadsheet and provide you with your CSRS licensee number.

Please follow the steps below:

- Columns C, L, and T through AC must be populated. No blank cells are allowed.
- Choose a CSRS role from the table shown on page 11.

  ****Important: Your input in column V must be an exact match to one of the roles within the CSRS table.*

T	U	V	W	X	Y	Z	AA	AB	AC
CSRS DEA	CSRS Licensee	CSRS Role	CSRS Location	CSRS NPI	CSRS Address1	CSRS Address2	CSRS City	CSRS State	CSRS Zip
xx1234567	xx12345	Physician Assistant with prescriptive authority	North Carolina Health Practice	000000000	123 Doctor Way	Ste A	Raleigh	NC	27610

CHOOSING A CSRS ROLE

Role	**Description**
Physician	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for physicians.
Pharmacist	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for pharmacists.
Nurse Practitioner	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for nurse practitioners.
Psychologist with prescriptive authority	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for psychologists with prescriptive authority.
Optometrist with prescriptive authority	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for optometrists with prescriptive authority.
Naturopathic Physician with prescriptive authority	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for naturopathic physicians with prescriptive authority.
Physician Assistant with prescriptive authority	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for physician assistants with prescriptive authority.
Medical Resident with prescriptive authority	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for medical residents with prescriptive authority.
Medical Intern with prescriptive authority	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for medical interns with prescriptive authority.
Dentist	This role will be used only for users who have completed the CSRS enrollment process. This role will be used for dentists.

REQUESTING NEW DSM ACCOUNTS

- To request a new DSM account, you will need to complete all of the fields in column A–J, as well as the required fields included below.

	K	L	M	N	O	P	Q	R	S
1	DSM Address	NPI Number	Phone Number	Mobile Number	Address 1	Address 2	City	State	Zip
2	John.Doe@direct.NCHP.nchie.net	1234567811	919-xxx-xxxx	919-xxx-xxxx	101 East Main Street	Suite 100	Raleigh	NC	26513

- **DSM Address:** The DSM address you are requesting for a new user, or the existing DSM address. New addresses must follow the nomenclature <First>.<Last>@direct.<FacilityDSMDomain>.nchie.net. For example, John.Doe@direct.NCHP.nchie.net.
- **NPI Number: Individual NPI is required.**
  - If you have an administrative role and/or do not have an NPI, please enter the value 247000000X in the NPI field.
- **Phone Number**
- **Mobile Number: if applicable**
- **Address 1**
- **Address 2: if applicable**
- **City**
- **State**
- **Zip**

Once you have completed the spreadsheet, email a copy to HIESupport@sas.com. In the email, please summarize the changes you have made.

USER AUDIT

THE QUARTERLY USER AUDIT WITHIN THE CLINICAL PORTAL

As the PAA (Participant Account Administrator) you play an important role in helping to manage and monitor usage of the NC HealthConnex clinical portal.

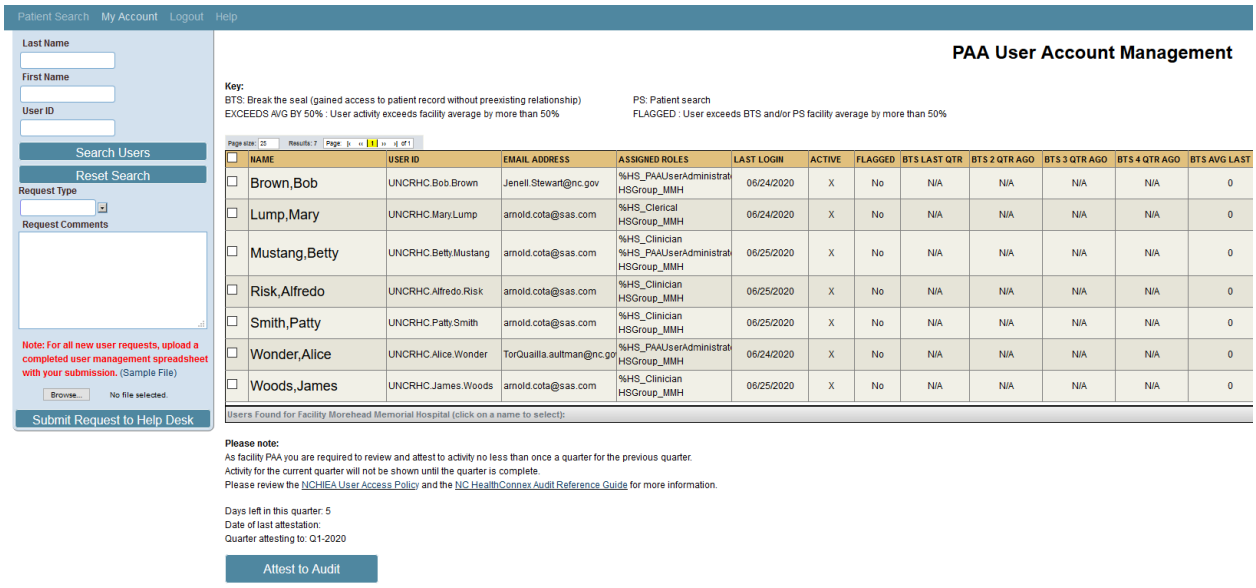
Beginning July 2020, PAAs will attest to user activity from within your NC HealthConnex portal account vs. on a PDF as was done in previous quarters. The quarterly User Audit involves reviewing break the seal and patient search activity for the users in your facility. You are expected to request invalid accounts be disabled by the Help Desk and report any unusual Break the Seal and Patient Search activity to the NC HIEA.

At the close of each quarter, an updated banner will include a reminder letting you know it is time to attest for the previous quarter's activity:

Notice:

Attention PAA (Participant Account Administrator) : You must attest to facility user activity each quarter. Log in with your PAA account and review user activity on your home page. When ready, click the "Attest to Audit" button to complete the audit attestation. Please work with the Help Desk to make any necessary changes to the users assigned to your organization prior to clicking the "Attest to Audit" button.

- To begin the audit, log in to your PAA account. Navigate to your PAA home page if you are not automatically redirected to this page. You will notice several changes on this page.



OVERVIEW

The PAA home page is used by PAAs to review the users who are part of their facility, the status of those users, and to request assistance from the Help Desk with user related issues.

KEY

Key:

BTS: Break the seal (gained access to patient record without preexisting relationship)
EXCEEDS AVG BY 50% : User activity exceeds facility average by more than 50%
PS: Patient search
FLAGGED : User exceeds BTS and/or PS facility average by more than 50%

The key describes some of the abbreviations that appear in the table. Here are a few that may be helpful:

- BTS – When you attempt to open a record for a patient with whom you do not already have a recorded relationship, you will be prompted to break the seal. This activity is logged. Although there are valid reasons a user may need to view the record, for security purposes, this activity is logged and audited. Example: A user breaks the seal to see records on a new patient.

- PS – When a user searches for a patient, an event is logged and audited.

- EXCEEDS AVG BY 50% - Each user is compared to the facility average for a specific activity. If that user's activity exceeds the facility average by more than 50%, the user is flagged for your attention and possible investigation. The average is for the last full quarter only.

- FLAGGED- If a user exceeds the average for break the seal or patient search actions for the facility by more than 50%, this is set. The average is for the last full quarter only.

USER TABLE

Page size: 10 Results: 7 Page 1 of 1

	NAME	USER ID	EMAIL ADDRESS	ASSIGNED ROLES	LAST LOGIN	ACTIVE	FLAGGED	BTS LAST QTR	BTS 2 QTR AGO	BTS 3 QTR AGO	BTS 4 QTR AGO	BTS AVG LAST QTR	BTS LAST QTR EXCEEDS AVG BY 50%	PS LAST QTR	PS 2 QTR AGO	PS 3 QTR AGO	PS 4 QTR AGO	PS AVG LAST QTR	PS LAST QTR EXCEEDS AVG BY 50%
☐	Brown,Bob	UNCRHC.Bob.Brown	Janell.Stewart@nc.gov	%HS_PAAUserAdministrator HSGroup_MMH	06/24/2020	X	No	N/A	N/A	N/A	N/A	0	0	N/A	N/A	N/A	N/A	0	0
☐	Lump,Mary	UNCRHC.Mary.Lump	arnold.cotta@sas.com	%HS_Clerical HSGroup_MMH	06/24/2020	X	No	N/A	N/A	N/A	N/A	0	0	N/A	N/A	N/A	N/A	0	0
☐	Mustang,Betty	UNCRHC.Betty.Mustang	arnold.cotta@sas.com	%HS_Clinician %HS_PAAUserAdministrator HSGroup_MMH	06/25/2020	X	No	N/A	N/A	N/A	N/A	0	0	N/A	N/A	N/A	N/A	0	0
☐	Risk,Alfredo	UNCRHC.Alfredo.Risk	arnold.cotta@sas.com	%HS_Clinician HSGroup_MMH	06/25/2020	X	No	N/A	N/A	N/A	N/A	0	0	N/A	N/A	N/A	N/A	0	0
☐	Smith,Patty	UNCRHC.Patty.Smith	arnold.cotta@sas.com	%HS_Clinician HSGroup_MMH	06/25/2020	X	No	N/A	N/A	N/A	N/A	0	0	N/A	N/A	N/A	N/A	0	0
☐	Wonder,Alice	UNCRHC.Alice.Wonder	TorQualita.aultman@nc.gov	%HS_PAAUserAdministrator HSGroup_MMH	06/24/2020	X	No	N/A	N/A	N/A	N/A	0	0	N/A	N/A	N/A	N/A	0	0
☐	Woods,James	UNCRHC.James.Woods	arnold.cotta@sas.com	%HS_Clinician HSGroup_MMH	06/25/2020	X	No	N/A	N/A	N/A	N/A	0	0	N/A	N/A	N/A	N/A	0	0

Users Found for Facility Morehead Memorial Hospital (click on a name to select):

This is a list of current users in your facility. Each row includes the user's name, user ID, inactive or active, last logon, role etc. along with BTS and PS metrics for each user.

- FLAGGED – Users with "Yes" in this column have exceeded the facility average for break the seal or patient search activity by more than 50% for the previous quarter. Pay special attention to these events and report unusual activity to the NC HIEA.

- BTS LAST QTR – The number of break the seal actions for this user in the last full quarter.

- BTS 2 QTR AGO – The number of break the seal actions for the quarter before the last full quarter. This is for historic reference.

- BTS AVG LAST QTR – This is the facility average for break the seal actions in the last full quarter. Note, this average is calculated by looking at the users active in the last full quarter, adding up their break the seal actions, and dividing by the number of users active in the last full quarter. Users may have been added since this average was calculated but the cutoff is the end of the last full quarter.

- BTS LAST QTR EXCEEDS AVG BY 50% - This column shows if this user's activity exceeds the facility average last quarter by more than 50%. Although you will want to review activity for all users, you may want to pay special attention to any flagged in this column.

*These same metrics are repeated for patient search activities.

NOTES

Listed here are some helpful reminders and links. Also shown:

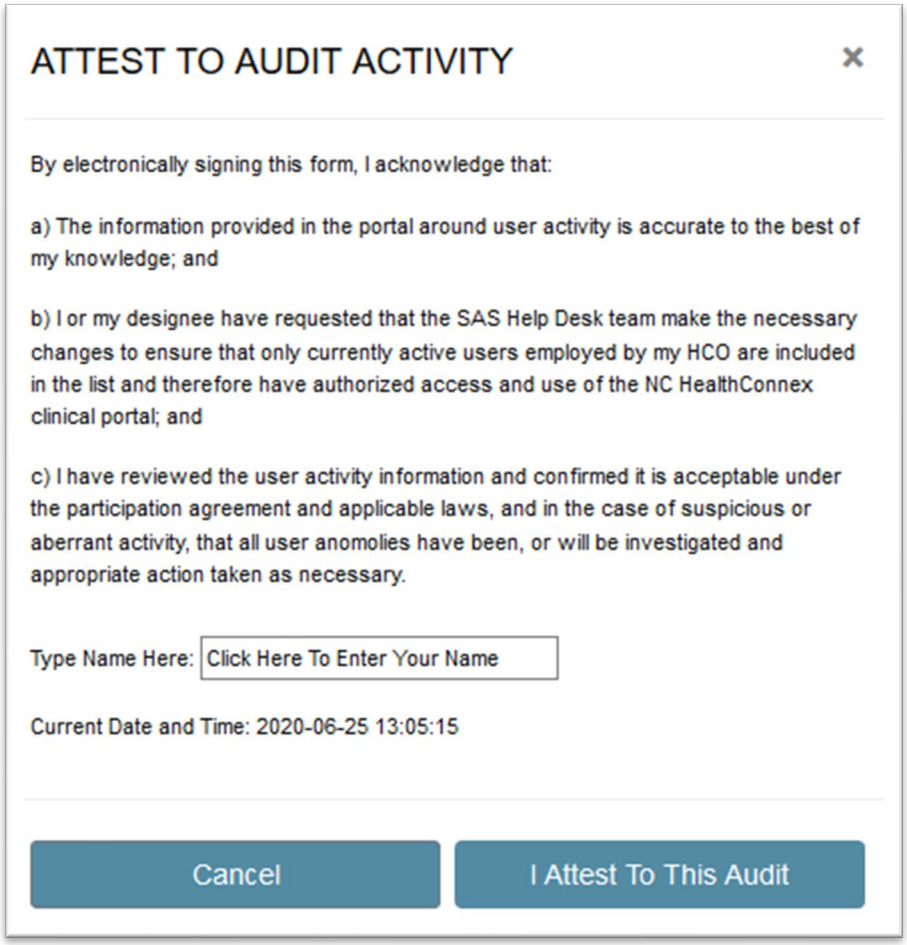
- Days left in this quarter – How many days are left in this quarter which means it is time to do another audit.

- Date of last attestation – The date of your last completed attestation.

- Quarter attesting to –The quarter for which the data in the table above pertains.

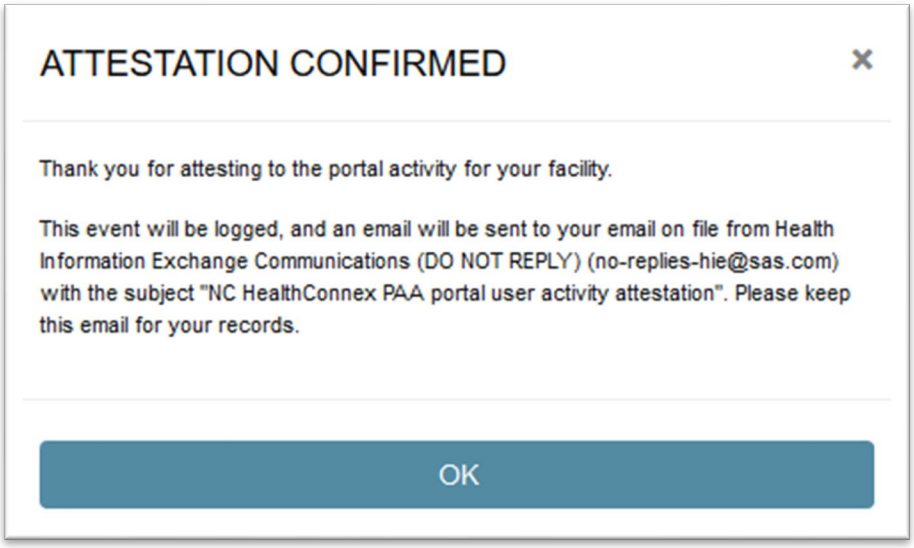
ATTEST TO AUDIT BUTTON

This button is used to complete the audit. Once you have reviewed the user list and activity of the users and agree that it complies with the user access policy, click this button. A dialog will be displayed for you to acknowledge. **Please note**: Inactive users must be removed via the Help Desk before you complete this step.



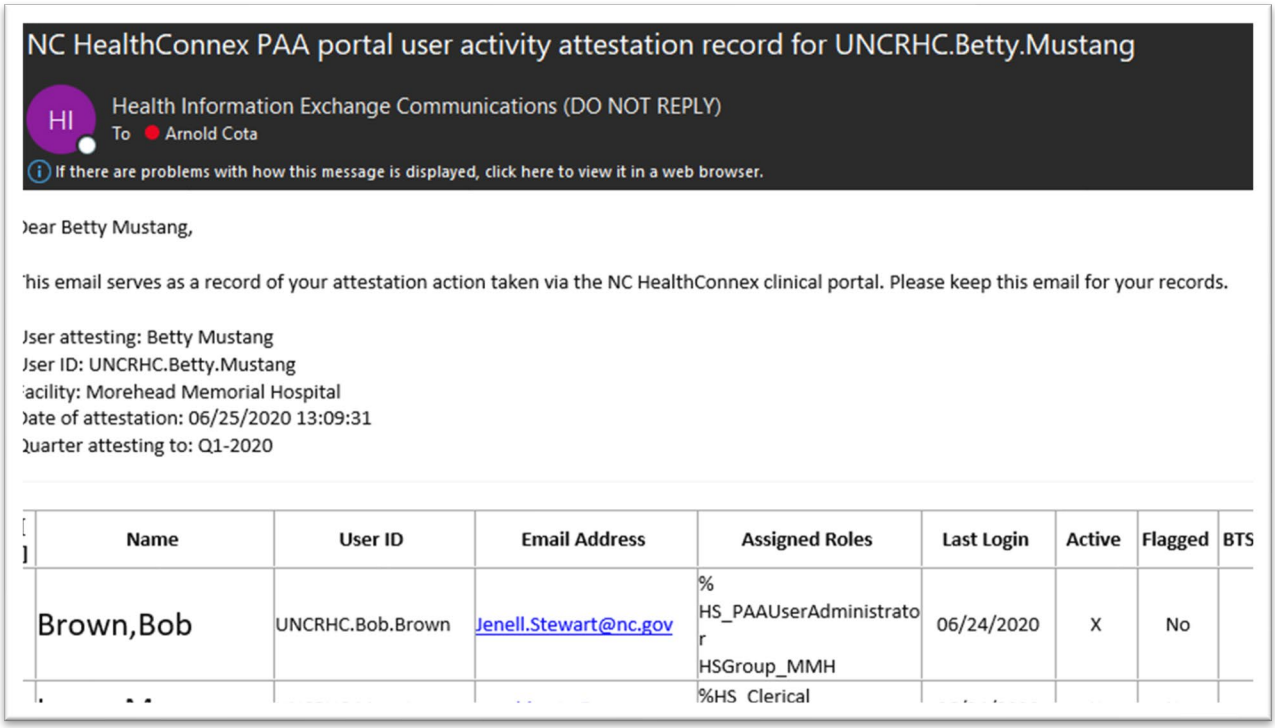
- Type your name in the field provided and click "I Attest To This Audit" when you are ready to attest. Click Cancel to go back to the user screen without attesting.

- After attesting you will see a notification informing you that a copy of this action has been recorded and emailed to the email address associated with your portal account.



EMAIL

A record of the attestation event and a copy of the data within the table at the time of attestation will be sent to your email on file. Please keep this for your records. Your attestation will also be logged in a report maintained by the NC HIEA.



Name	User ID	Email Address	Assigned Roles	Last Login	Active	Flagged	BTS
Brown,Bob	UNCRHC.Bob.Brown	Jenell.Stewart@nc.gov	% HS_PAAUserAdministrator HSGroup_MMH	06/24/2020	X	No	
			%HS_Clerical				

FAQs

- How can I get a copy of the User Management Spreadsheet?
  - There is a link named "Sample File" on the PAA User Account Management home page that will open a blank copy of the User Management Spreadsheet.
  - You may also obtain a copy by emailing HIESupport@sas.com

- Can I delete a user?
  - For security purposes, users cannot be deleted. You can only request to disable or enable users. To disable an account, ensure the UserID is accurate, and enter the value **FALSE** into the **ENABLED** field of the spreadsheet.

- I do not know my facility code. Can the Help Desk provide this to us?
  - Yes, please contact the Help Desk at HIESupport@sas.com or (919) 531-2700.

- If I want to update an existing user, do I need to complete the spreadsheet?
  - No. You may send your request to update a user to the Help Desk team via the NC HealthConnex Clinical Portal. Please refer to the instructions on page 8 of this guide.

- Is it possible to have a DSM account without a NC HealthConnex portal account?
    - No. All DSM messaging is done through a user's portal account by clicking on the Messaging tab within the menu bar.

- Will I automatically have DSM access with my new portal account?
  - No. A PAA must request a DSM account for each user. Once the DSM account has been created, the Messaging function within the portal will be activated. For more information, see the Direct Secure Messaging Fact Sheet.

- Can users reset their own password?
  - Yes. Please refer to page 11-12 in the NC HealthConnex Clinical Portal User Guide for instructions on password reset and account security information.

- How can I get additional training?
  - Visit the Training & Tools page of the NC HealthConnex website at https://nchealthconnex.gov for additional tools and to register for upcoming Teletown Halls.

- Where can I find the NC HealthConnex Clinical Portal User Guide?
  - The User Guide can be found on the Training & Tools page of NC HealthConnex website.

- Can a provider reach out to the Help Desk directly?
    - All user account and DSM management functions must be coordinated by the person in the health care organization that has been assigned the roll of Participant Account Administrator (PAA). The HIEA Help Desk team will work with the health care organization's PAA to create, edit or deactivate accounts. Contact the HIEA Help Desk at HIESupport@sas.com or (919) 531-2700.

WHO TO CONTACT:

- NC HealthConnex website: https://nchealthconnex.gov
- HIEA Business Office: HIEA@nc.gov or (919) 754-6912
- NC HealthConnex Help Desk: HIESupport@sas.com or (919) 531-2700
- Specific Questions?
  - **NC HealthConnex Portal & DSM Accounts:** Contact the HIEA Help Desk at (919) 531-2700 or HIESupport@sas.com.
  - **Quarterly User Audit:** Contact the HIEA Help Desk at (919) 531-2700 or HIESupport@sas.com.
  - **NC*Notify or other NC HealthConnex Value-Add Services**: Contact the HIEA Business Office at (919) 754-6912 or HIEA@nc.gov.
  - **Additional NC HealthConnex Portal Training**: Contact the HIEA Business Office at (919) 754-6912 or HIEA@nc.gov.

SAS® NC HIEA HELP DESK COMMUNICATION PROCESSES:

All Participants of the NC Health Information Exchange Authority (NC HIEA) should designate one or two **Participant Account Administrators (PAAs)** for their organization who will have authority to utilize the SAS® HIE Technical Support Team and Help Desk.

PAAs should communicate their name and contact information to the SAS® HIE Technical Support Team at HIEsupport@sas.com, as well as future changes in administration so that contact information is kept up to date.

All end users from an organization should communicate any questions about usage of the Clinical Portal to their organization's PAA(s). The PAA(s) should first try to answer the questions for their end users. If the PAA(s) is unable to answer the question or has discovered an issue with the application, they should then direct questions, themselves, to the SAS® HIE Technical Support Team on behalf of their end users using one of the contact options below.

NC HIEA Help Desk: HIESupport@sas.com or (919) 531-2700

Technical Support Escalation Process

To contact the SAS® NC HealthConnex Help Desk:

Call (919) 531-2700 and ask for assistance with NC HealthConnex. Or send an email to HIESupport@sas.com.

SAS® NC HealthConnex Help Desk Hours of Operation:

Monday through Friday 8 a.m. to 8 p.m.

Escalations:

If at any point you need to escalate an issue, feel free to contact Arn Cota, the Technical Team Lead for the SAS® NC HealthConnex Technical Support team, at 919-531-3372 or Arnold.Cota@SAS.com at any time.

Emergency Issues After-Hours: If your organization experiences a total HIE system failure, this is considered a critical priority 1 issue. Please have the system administrator and IT point of contact validate the outage is across all users.

- For these emergency issues, please call the phone support lines for assistance, 919-531-2700. The SAS® operator will forward you to a live, SAS® Technical Support representative who will gather information and triage your issue appropriately.

PAA USER GUIDE CONTENT DISCLAIMER

The screenshots and presentations herein are intended as examples only and may differ from the actual screenshots and presentations generated by the released product in commercial production.

PARTNERS

About SAS Institute

The NC HIEA's technical partner for delivering NC HealthConnex is SAS Institute.

Through innovative analytics, business intelligence and data management software and services, SAS helps customers at more than 80,000 sites make better decisions faster. Its world headquarters are based in Cary, North Carolina. SAS also operates the NC HIEA Technical Support Help Desk. For more information, visit SAS.com.

About InterSystems

The NC HealthConnex HIE Platform is powered by the InterSystems HealthShare product.

InterSystems is the engine behind many important applications in health care, finance, government, and other sectors where lives and livelihoods are at stake. Founded in 1978, InterSystems is a privately held company headquartered in Cambridge, Massachusetts (USA), with offices worldwide, and its software products are used daily by millions of people in more than 80 countries. For more information, visit InterSystems.com. J2 Interactive is the integration partner working with InterSystems for NC HealthConnex.

About SES

NC HealthConnex Direct Secure Messaging is powered by Secure Exchange Solutions (SES).

SES sets the standard for seamless, scalable, secure connectivity across organizational boundaries. As an industry-leading health information technology provider, SES protects, streamlines and delivers sensitive and critical health care information while ensuring compliance and improving efficiency and quality. Hospitals, health systems, physicians, health plans and channel partners rely on SES for integrated secure communications that expand their reach and empower them to improve patient care. SES is a committed member of DirectTrust, helping healthcare stakeholders

leverage standards-based communications to communicate across organizational boundaries. For more information, visit SecureExSolutions.com.

About DirectTrust

NC HealthConnex, in connection with SES, is part of the DirectTrust nationwide network.

DirectTrust is a collaborative non-profit association of 121 health IT and health care provider organizations to support secure, interoperable health information exchange via the Direct message protocols. DirectTrust has created a "trust framework" that makes it easy for health care professionals, health IT vendors and their patients/customers to communicate securely, with identity proofing, regardless of end-user application. Over 300 EHR and personal health record (PHR) vendors' products, and over 50 HIEs, participate in the DirectTrust network, ensuring interoperability and security via Direct for exchange of health information to more than half the professionals in the U.S. health care system. For more information, visit DirectTrust.org.

About The North Carolina Department of Health and Human Services (NCDHHS)

The NC HIEA works closely with NCDHHS to support Medicaid and public health efficiencies.

The North Carolina Department of Health and Human Services (NCDHHS) manages the delivery of health- and human-related services for all North Carolinians, especially our most vulnerable citizens – children, elderly, disabled and low-income families. The Department works closely with health care professionals, community leaders and advocacy groups; local, state and federal entities; and many other stakeholders to make this happen. The Department is divided into 30 divisions and offices. NCDHHS divisions and offices fall under four broad service areas - health, human services, administrative, and support functions. NCDHHS also oversees 14 facilities: developmental centers, neuro-medical treatment centers, psychiatric hospitals, alcohol and drug abuse treatment centers, and two residential programs for children. For more information, visit NCDHHS.gov.

About the North Carolina Health Information Exchange Authority (NC HIEA)

The North Carolina Health Information Exchange Authority (NC HIEA) operates North Carolina's state-designated health information exchange, NC HealthConnex. NC HealthConnex is a secure, standardized electronic system in which providers can share important patient health information. The NC HIEA is committed to its mission: to connect health care providers to safely and securely share health information through a trusted network to improve health care quality and outcomes for North Carolinians. For more information about the NC HIEA visit: https://hiea.nc.gov/about-us/about-nc-hiea.