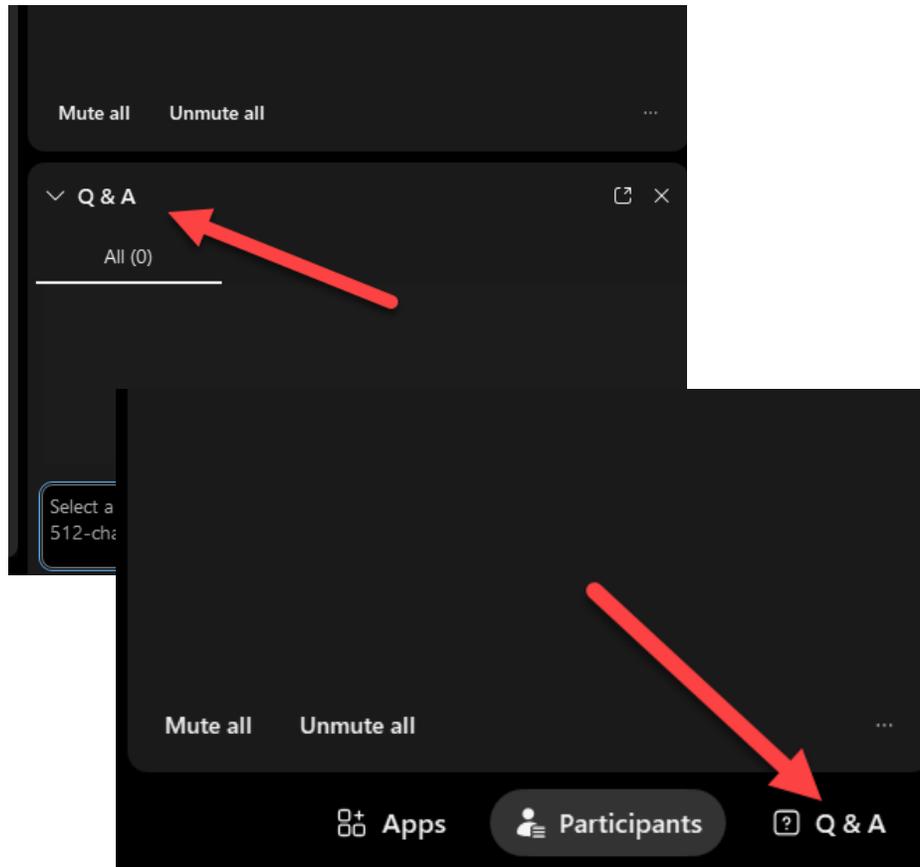**NORTH CAROLINA HEALTH INFORMATION EXCHANGE AUTHORITY**

February 28, 2024

Hosted by:

Kenya Servia

Business Development Specialist

N.C. Health Information Exchange Authority

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Housekeeping Items Before We Start

- At the end, if you have a question, you can utilize the Q&A feature.

- A copy of the presentation slides will go out to everyone who registered for today's webinar.

North Carolina Health Information Exchange Authority

Overview of Topics

- **Welcome and Introductions**

- **Participant Account Administrator Roles & Responsibilities**

- **Credentialing Process**

- **User Account Management**

- **Quarterly User Audit**

- **Direct Secure Messaging**

- **Questions**

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NC HIEA Outreach Team Members

Tim Taylor
Business Relationship Manager

Tim has 10 years of health care operations leadership and management experience and serves as a liaison for healthcare providers and organizations across North Carolina.

Kimberly Webster
Business Development Specialist

Kim started with the NC HIEA in 2022. She assists participants in understanding how to access and utilize NC HealthConnex. Kim has worked as a nurse since 2004 and maintains her nursing license.

Luke Keeler
Business Development Specialist

Luke Keeler has 15 years of experience working in public health at local health departments and NC DHHS. He joined the NC HIEA in 2023.

Kenya Servia
Business Development Specialist

Kenya Servia has worked at the NC HIEA since April 2018, educating health care providers about NC HealthConnex. She has over 25 years experience working in public health as a social worker, health educator and program consultant.

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Introducing New Team Members

Adonnica Rowland
Business Development and Outreach Specialist

We welcome Adonnica Rowland to the NC HIEA as our newest business development specialist. Adonnica has worked in both private and public sectors in health IT and health informatics since 2012. Her private sector experience has given her expertise to assist in statewide programs and projects. She previously served the state through roles at NCDHHS, the Office of NC Fast, UNC General Administration and UNC Chapel Hill. Adonnica joined the NC HIEA outreach team in December 2023.

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PAA Roles & Responsibilities

PAA's Role and Responsibilities

- Serve as main point of contact for the NC HIEA

- Act as the point person for providers and staff

- Manage creation and deactivation of user accounts

- Update NC HealthConnex with address and staff changes

- Ensure participating entity list is up to date

- Ensure EHR contact is up to date

- Attest to the Quarterly User Audit

PAA Must Request Portal Credentials:

Notice:

The NC Health Information Exchange Clinical Portal and Direct Secure Messaging (Web Communicate) will experience regularly-scheduled, routine maintenance every third weekend. The outage is planned to begin at 7:00 AM EST on Saturday.   We apologize for any inconvenience this may cause.

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DemoID1

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Login

NC HIEA DEMO ENVIRONMENT

The North Carolina Health Information Exchange Authority (NC HIEA) operates North Carolina's statewide health information exchange, NC HealthConnex. This secure, standardized electronic system promotes the access, exchange, and analysis of health information.

Login Agreement
Please note that every time you login, you are agreeing to the terms signed by your organization, that provided you with a unique User ID, including (but not limited to) the following:

NC HealthConnex Clinical Portal - Users

Who uses the portal and why?

– **Providers and other clinical/clerical staff**

- Research patient history, including encounters and diagnoses
- Review procedures and results
- DSM

– **Participant Account Administrators (PAAs)**

- Maintain user accounts
- Submit requests to SAS Help Desk

Guest Speaker Introduction

Holli Elliott
SAS Help Desk – Senior Technical Support Analyst

Holli has 12 years of experience working in health care IT. She has been a technical support analyst on the SAS NC HealthConnex Help Desk since 2017. Prior to working in the health care industry, Holli was a special education teacher with Wake County Public Schools.

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Credentialing Process

NC HealthConnex Portal Credentials

If you are a Participant Account Administrator (PAA) for your organization, contact the NC HealthConnex Help Desk Team to request an account.

The Help Desk will follow-up by creating an NC HealthConnex portal account for you. By default, you will be assigned the PAA role. This role only allows you to view a list of users associated with your organization.

If you need access to patient records, please request either the Clerical or Clinical role be added to your account.

- Clerical – patient demographics

- Clinical – full patient records

After your account has been created, the Help Desk will send you instructions for requesting accounts for your providers and staff.

User Account Management

User Account Management – Creating New User Accounts

To create new user accounts for members of your staff, you will need to complete the following fields in the **User Management spreadsheet**. Please do NOT delete any rows or columns.

Please note: This spreadsheet is updated from a previous version.

Facility	Roles	Last Name	First Name	Suffix	Email	Job Title or Job Description	Enabled	DSM Address	Provider NPI Number	Phone Number	Address 1	Address 2 City	State	Zip

- <u>Facility Name</u> – as it appears on your Participation Agreement
- <u>Roles</u> – Select a role from the drop-down menu.
- <u>User First and Last Name</u>
- <u>Job Description</u> – e.g., Clinician, Billing Manager, Office Manager, etc.
- <u>Enabled</u> – True – Contact the Help Desk if you need a user disabled.
- <u>DSM</u> – Yes – After you have enrolled in the service, fill out the DSM (orange fields) for users for whom you want us to create a DSM address.

If you need the spreadsheet template, please reach out to the SAS Help Desk Team at HIESupport@sas.com.

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User Account Management - Functional Roles

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) • Health Care Organization (HCO) Staff

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User Management – Submitting a Spreadsheet

Log into the Clinical Portal.

User Management – Submitting a Spreadsheet

PAA + Clinician View

User Management – Submitting a Spreadsheet

To request new accounts, upload the User Management Spreadsheet to the portal OR send the spreadsheet to the Help Desk at hiesuport@sas.com.

To disable a user, send an email to the Help Desk. Include the user(s) name OR submit your request from within your portal account.

User Management – PAA View

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Quarterly User Audit

Quarterly User Audit FAQs

How often does the NC HealthConnex User Account Audit occur?

An audit will be performed quarterly. Emails are sent to the PAAs on the second Monday following the beginning of the quarter: January, April, July, October.

As a PAA, what is my responsibility regarding the Audit?

Click on the PAA Tools tab from within your NC HealthConnex portal account. View a list of users. If any of those listed no longer require access to the portal, send an email to the Help Desk to request the user(s) be disabled.

Note the number of "Patient Search" and "Break the Seal" actions for each user. If a user had an unusual amount of "Break the Seals" and/or Patient Search activity, you are required to report that to the North Carolina Health Information Exchange Authority (NC HIEA).

Attesting to the User Audit

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

> **PAA(Participant Account Administrator): You must attest to facility user activity for the Q4-2023 quarter. Login with your PAA account and review user activity on your PAA home page. When ready, click the "Attest to Audit" button to complete the audit.**

Attesting to the User Audit

The PAAs Tools Tab will show you a list of users associated with your organization along with Patient Search and BTS-Break the Seal Activity

More Quarterly User Audit FAQs

Why does the NC HIEA require user audits?

To protect both your practice and your patients' data, we want to ensure that NC HealthConnex allows only the appropriate people with the appropriate access to view patient records.

I never log into the portal and/or my facility is not live. Why do I need to attest each quarter?

If any user within your organization has access to the portal, you are required to attest to each quarterly user audit. Access to the portal is unrelated to the status of your connection to NC HealthConnex.

Direct Secure Messaging (DSM)

Direct Secure Messaging Overview

What is Direct Secure Messaging?

DSM is a secure form of email, that allows a provider to send PHI through a secure network to other providers with a DSM account. DSM is commonly used for referrals and transitions of care.

Full Participation Agreement

You must have a Full PA on record with the NC HIEA.

How much does this service cost?

The state does NOT charge for any services!

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Enrolling in DSM

Email the help desk team to request a DSM sub-domain.

The Help Desk will send you the Authorized Business Representative (ABR) ID Verification form. There are three sections to be filled out. Detailed instructions are provided when the form is sent to you.

- Section I: Facility name, chosen sub-domain name, etc.
- Section II: Whomever you designate as the ABR. It is helpful if this person is also a PAA. They ABR must have their personal ID verified.
- Section III: Organizational Officer. If you are a sole practitioner, you can sign both sections II and III.

After the ABR's *personal* identity is verified, individual DSM addresses can be created for you and your staff.

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How do I access DSM?

After the DSM sub-domain has been created for your organization, a DSM address will be added to your NC HealthConnex portal account and to the next Provider Directory.

You will access DSM from within your portal account. If you do not have a portal account, one will be created for you.

From within your portal account, you will click on the Message Tab.

The Messaging Center looks very much like a standard webmail application. You will be able to Compose, Reply, Reply All, and Forward Messages. You can also add attachments.

Direct Secure Messaging Provider Directory

The DSM Provider Directory

The Provider Directory is published quarterly. Consider it a "phone book" of DSM addresses.

You as the PAA or ABR will be sent a copy of the DSM Directory for your review. If no changes are required, no further action is needed.

If DSM addresses associated with your facility were created by another HISP-Health Information Service Provider (typically your EMR vendor), contact the HISP to request new addresses be created or old ones deleted. Whatever changes they make should be reported to Direct Trust.

If your DSM address was created by the NCHIE, contact the Help Desk Team to request updates. DSM addresses created by the NCHIE include @direct.nchie.net in the address.

After the deadline to request updates has passed, a new DSM Directory will be published. Copies will be sent to the PAAs and ABRs on record.

NC Health Connex Clinical Portal Demo

Training Opportunities/Upcoming Events

- On Demand Training
  - [NC HIEA Training Modules](#)

- Live Training
  - [Training Requests](#)

- Online Training (Webinars)
  - Office Hours – [March 13, 2024](#)
  - Teletown Hall: Q2 – [April 17, 2024](#)

Office Hours Webinar
Wednesday, March 13

A discussion led by providers' pre-submitted questions.

Question and Answer

For more information visit,

www.nchealthconnex.gov

Tel: 919-754-6912

E-mail: hiea@nc.gov

Kenya.Servia@nc.gov

For technical support,

Tel: 919-531-2700

E-mail: HIESupport@sas.com

DO NOT SEND PHI to the Help Desk!

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