



NORTH CAROLINA HEALTH INFORMATION EXCHANGE AUTHORITY

Teletown Hall

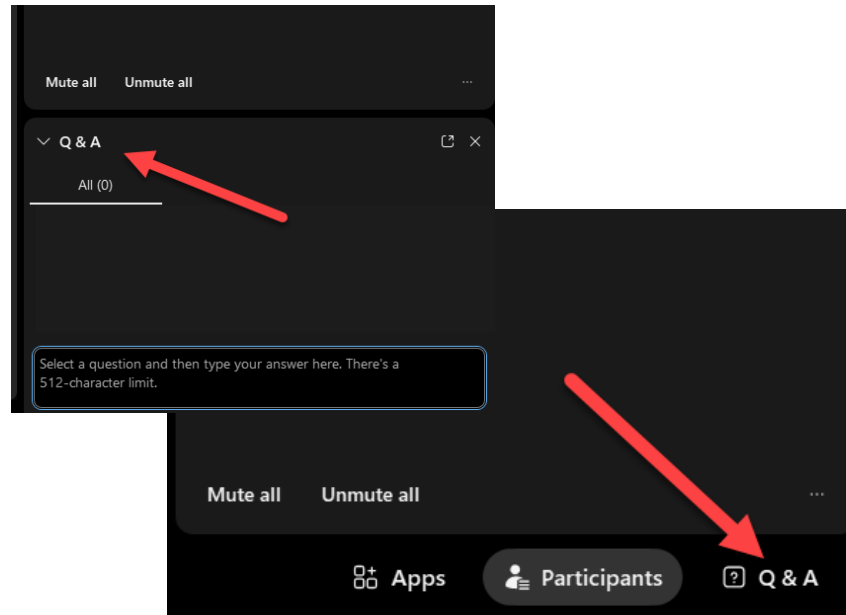
September 13, 2023

NC Health Information Exchange Authority

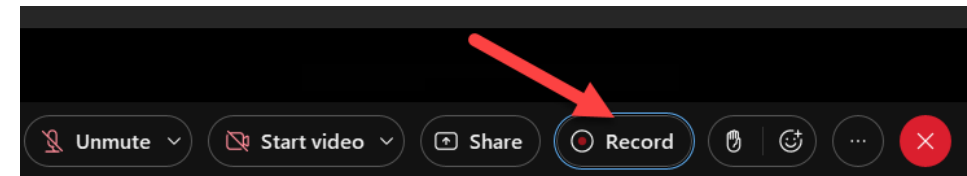


Before We Begin...

Housekeeping Items with WebEx



Please place your questions in Q&A.



Please note that this presentation will be recorded.

North Carolina Health Information Exchange Authority

Agenda

12:00 – 12:05	Welcome & Introductions	Tim Taylor
12:05 – 12:20	Participant Engagement <ul style="list-style-type: none">• The Role of the Participant Account Administrator (PAA)• Organization Contact Information• Facility Turnover• Quarterly Audit	Luke Keeler
12:20 – 12:30	Office Hours Announcement <ul style="list-style-type: none">• Registration details• Question Submission	Kimberly Webster
12:20 – 12:40	Direct Secure Messaging Overview	Kimberly Webster
12:40 – 12:50	Notices & Alerts Web Page	Jessie Hagins
12:50 – 1:00	Upcoming Events	Kim Webster



Welcome and Introduction



Jessie Hagins
Communications Specialist

Jessie has worked in broadcasting and communications for 21 years as a reporter, producer and videographer. She has been with the NC HIEA since September 2022 and is enjoying learning more about Health IT.



Luke Keeler
Outreach Specialist

Luke Keeler has 15 years of experience working in public health at local health departments and NC DHHS. He is excited to join the NC HIEA team to help increase access to NC HealthConnex.



Tim Taylor
Business Relations Manager

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



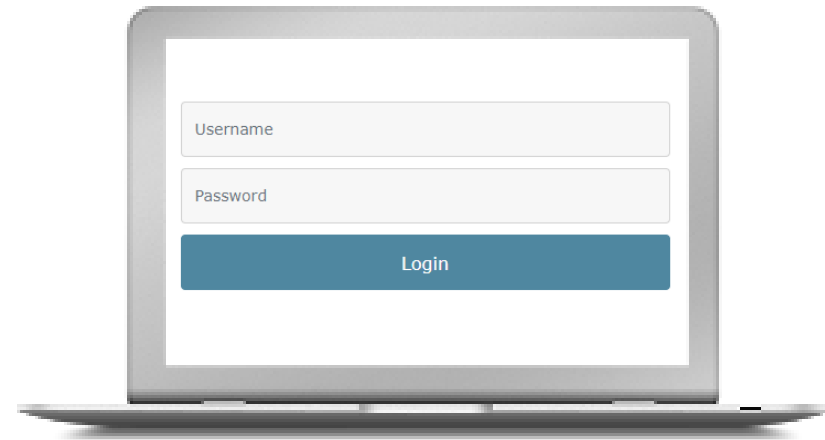
Kimberly Webster, RN
Outreach Specialist

Kim started with the NC HIEA in 2022. She assists participants in understanding how to access and utilize NC HealthConnex.



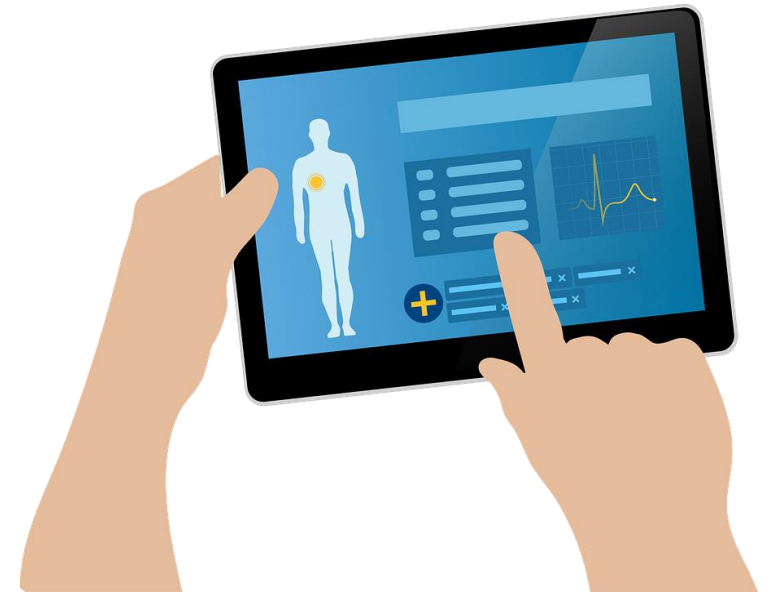
Participant Engagement

- Proactive Outreach
- The Role of the Participant Account Administrator (PAA)
 - Organization Contact Information
 - Facility Turnover
 - Quarterly Audits



Proactive Outreach

- We want you to know who we are and how we can help you.
- We want you to know that we are here to support your organization in your NC HealthConnex journey.
- We are creating multiple initiatives to proactively communicate with you all on a more frequent basis.
- Please remember, you are not alone in this process.



Roles and Responsibilities of the Participant Account Administrator (PAA)

- Serve as Main Point of Contact
- Manage Creation and Deactivation of User Accounts
- Act as the Point Person for Providers and Staff
- Update NC HealthConnex with Address and Staff Changes
- Ensure Participating Entity List is Up to Date
- Ensure EHR Contact is Up to Date
- Complete and Return Quarterly User Account Audit



Quarterly User Account Audit

The second Monday following the end of each quarter, PAAs are sent an email requesting they conduct a Quarterly User Account Audit.

Their responsibilities include:

- Disabling user accounts (if required according to the NC HIEA User Access Policy).
- Reporting any unusual user activity to the HIEA. This includes unusual numbers of patient searches and break the seals for a particular user.
- Filling out and signing the Attestation Form and returning it to the HIE Help Desk team at HIESupport@sas.com

Quarterly User Account Audit

Dear NAME:

In accordance with the NC Health Information Exchange Authority (NC HIEA) [User Access Policy](#), we are conducting the quarterly audit of your NC HealthConnex user accounts. Please find your organization's Quarterly User Audit & Activity Audit Attestation form attached. As Participant Account Administrator, it is your responsibility to audit your users' accounts and activity on an ongoing basis and respond to the NC HIEA quarterly within 10 business days of this notification.

Please note, participants who do not respond to two consecutive user audits will have their user credentials deactivated after the second audit is completed. This will ensure only active authorized users will have access to NC HealthConnex and patient data.

Summary of the steps to complete in the next 10 business days:

1. Review the attached Attestation form and initiate changes if required. Instructions for disabling user accounts can be found in the [PAA User Guide](#).
2. Review user activity and report unusual numbers of break the seal and patient searches to HIEALegal@nc.gov.
3. Electronically complete Table 3 of the Attestation form, using a PDF editor, by typing information into the form's fields. **You will need to save the document prior to adding text.**
4. Add your electronic signature at the end of the form (do not print out and sign the form manually). If you are not able to add a digital signature, you may type your name in the signature field. Please note, your typed name will be considered your legal signature.
5. Email the PDF form directly to the SAS Help Desk at HIESupport@SAS.com with the following subject line format: 'NC HealthConnex Quarterly User Account Audit - [Insert Your Facility Name] [Insert MM/DD/YY]'. **Do not return the form to the no-replies email address.**

Note: If you access NC HealthConnex data via your EHR, your technical point of contact likely received test credentials during implementation. Any user credentials that were created for testing purposes should be included in this audit and in your reporting on the Attestation form. It is your decision to disable testing accounts or not.

If you are NOT the appropriate individual to act as Participant Account Administrator for your facility or if you need assistance, please contact the SAS NC HealthConnex Help Desk via email at HIESupport@sas.com or by phone at 919-531-2700. Be sure to indicate that you are calling about NC HealthConnex.

You're Invited! We welcome you to join us for a User Audit Webinar on **Wednesday, July 17, 2019 from 12:00 p.m. – 1:00 p.m.** We will walk you through the steps to completing the Attestation form and will guide you through adding and updating users to the User Management Spreadsheet. We will also be available to answer any questions you have regarding the User Audit. Please click [here](#) to register.

Thank you for your continued support of NC HealthConnex and your timeliness in completing the user audit. The audit is an important component to ensuring the system's security is maintained.

Thank you,
SAS NC HealthConnex Help Desk



Quarterly User Account Audit – The Attestation Form



1

NC HealthConnex Quarterly User Account & Activity Audit Report

On a quarterly basis, the NC HIEA asks all Participant Account Administrators (PAAs), to audit their health care organization's (HCO) assigned users to ensure that all current NC HealthConnex clinical portal users are still employed at your facility and that all current users continue to be authorized to have access to NC HealthConnex. Additionally, the HIEA is now adding user activity to this audit process as it is not only vitally important to know who is using the NC HealthConnex clinical portal, but how they are using it. Both of these requirements are outlined in the Participation Agreement.

User Activity Audit Directions:

In Table 1, all user accounts associated with your HCO are listed, along with the number of times these users have completed patient queries or have broken the seal to access patient records not already attributed to your health care staff. In Table 2, the users who have exceeded your HCO's average searches and seal breaks are shown.

If your Participant HCO has Participating Entities (e.g. other locations, satellite clinics, regional HIE participants, etc.), and you are designated as their PAA, please also ensure that the user accounts associated with the Participating Entities are accurate. If a Participating Entity has their own designated PAA, that PAA should complete a separate User Account and Activity Audit Report form.

Instructions: Complete Table 3 after reviewing the list of user accounts and relevant user activity shown in Tables 1 and 2. Please also sign the acknowledgement.

Table 1: Clinical Portal User Accounts and Activity Report

Table 1					Number of Break the Seals				Number of Patient Searches			
User Name	First Name	Last Name	Access Level	Active Account (0/1)	2018Q3	2018Q4	2019Q1	2019Q2	2018Q3	2018Q4	2019Q1	2019Q2
			PAA	1	0	0	0	0	0	0	0	0



Quarterly User Account Audit – The Attestation Form

Table 2. Frequent Clinical Portal Users

This table shows the authorized users who exceeded your HCO's average number of patient queries and/or break the seals by 50% for this audit report period. Note: Average is rounded to the nearest whole number. **Please contact the NC HIEA immediately if you would like to discuss suspicious user behavior at 919-754-6912 or HIEALegal@NC.gov.**

Table 2					Break the Seals - Avg Exceeded by 50%		Patient Searches - Avg Exceeded by 50%	
User Name	First Name	Last Name	Access Level	Active Account (0/1)	HCO Average	2019Q2	HCO Average	2019Q2
NONE EXCEEDED AVG BY 50%					0	-	0	-

Table 3. Participant Information

Please complete the information electronically. Do **not** print and complete this form manually.

Table 3	
Information Requested	Response
Participant Organization Name	
Organization NPI	
Street Address	
City	
State	
ZIP	
PAA Name	
Phone	
Email	
Report Period	2019Q2

NC HealthConnex Participant Acknowledgment







NC HealthConnex Portal

How to Disable User Accounts

Deactivating a User Account

If you wish to deactivate a user, ensure the user ID is correct and change the ENABLED column value to **FALSE**



	A	B	C	D	E	F	G	H	I	J	K
1	Facility	Facility Co	Roles	User ID	Last Name	First Name	Suffix	Email	Descriptio	Enabled	DSM Address
2	Richmond	RCHD	%HS_Clinician	DemoID1	Man	EMR		EMR.Man@RCHD.co		TRUE	DemoAccount@servcie.directaddress.net
3	Richmond	RCHD	%HS_Clinician	DemoID2	Duck	Donald		Donald.Duck@RCHD		TRUE	DemoAccount@servcie.directaddress.net
4	Richmond	RCHD	%HS_Clinician	DemoID3	Lady	Clinical		Clinical.Lady@RCHD.		TRUE	DemoAccount@servcie.directaddress.net
5	Richmond	RCHD	%HS_Clinician	DemoID4	Man	DSM		DSM.Man@RCHD.co		TRUE	DemoAccount@servcie.directaddress.net
6	Richmond	RCHD	%HS_Clerical	DemoCler	Doctor	Doctor		Doctor@RCHD.com		TRUE	DemoAccount@servcie.directaddress.net
7	Richmond	RCHD	%HS_PAAUserAdministrator	DemoAdn	Doctor	Another		Another.Doctor@RC		TRUE	DemoAccount@servcie.directaddress.net
8	Richmond	RCHD	%HS_Clinician %HS_PAAUserAdministrator	DemoAdn	Administr	Lady		Administrator@RCH		FALSE	DemoAccount@servcie.directaddress.net
9											
10											
11											
12											

Disabling User Accounts

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.

The screenshot shows a web form for user management. It includes input fields for Last Name, First Name, and User ID, followed by Search Users and Reset Search buttons. Below these is a Request Type dropdown menu, which is highlighted with a yellow arrow. A yellow arrow also points from the Request Type dropdown to a separate menu box on the right. This menu box contains the following options: Create User, Update User, Enable User, Disable User, Reset Password, and Other. A yellow arrow points from the Disable User option back to the Request Type dropdown. Below the Request Comments text area is a field for User Accounts File Name with a Browse... button, also highlighted with a yellow arrow. At the bottom of the form is a Submit Request to Help Desk button, which is highlighted with a yellow arrow.

NC HIEA Office Hours

New quarterly call that launched 8/16/23

- Developed in response to the 2022 Participant Survey
- Topics included:
 - General HIEA inquiries
 - DSM (Direct Secure Messaging) Provider Directory
 - NC*Notify
 - HIE Act requirements
 - Pharmacy connections
 - Training needs/opportunities
 - Clinical workflow
 - Connection types (Uni-directional, Bi-directional, Single Sign On)
 - Privacy and Security



NC HIEA Office Hours

Key Takeaways

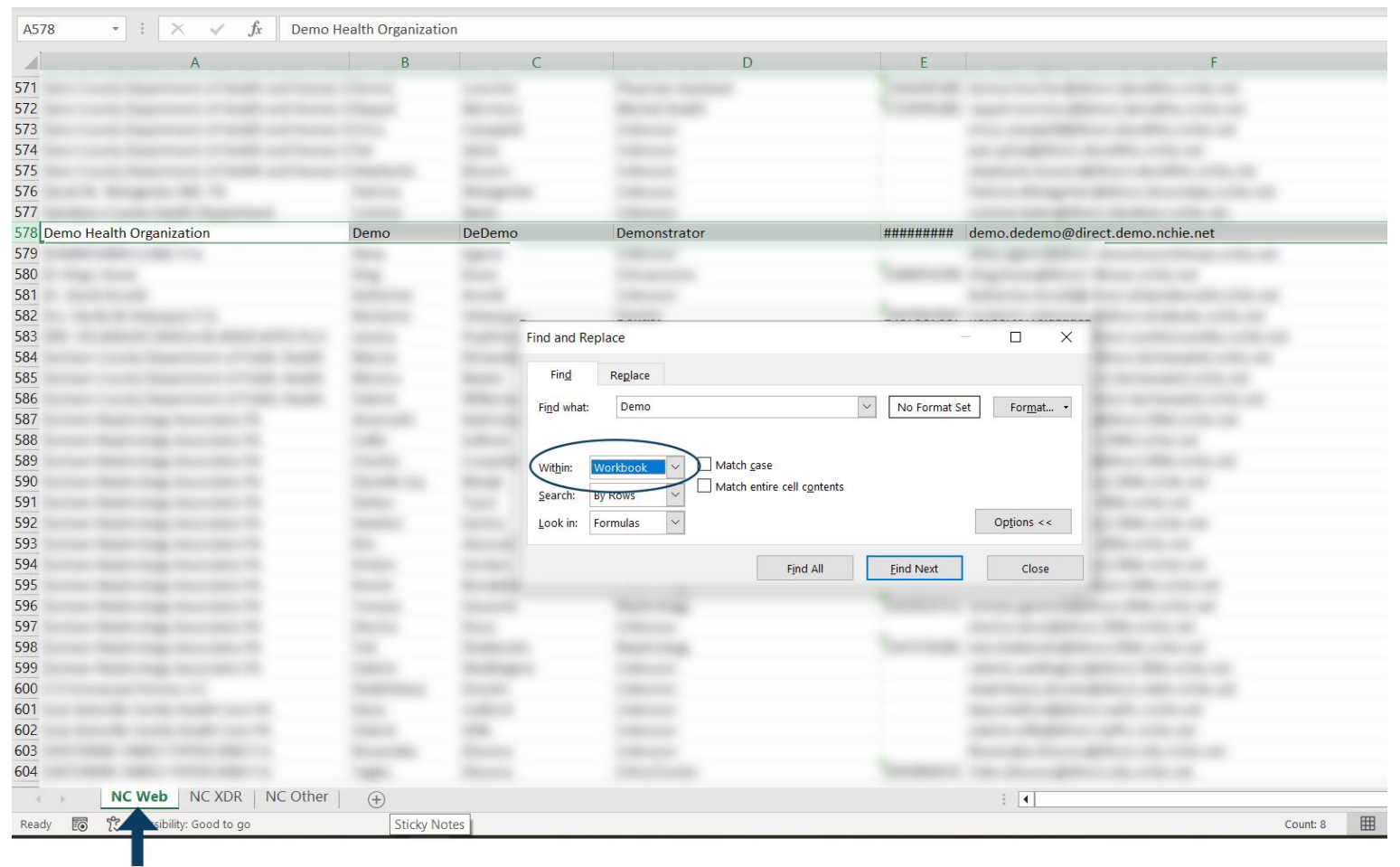


- 200 registrants
- 73 attended the live webinar
- Participants are engaged and curious about how to utilize NC HealthConnex.
- Participants want to know where to find information on the website.
- Participants can [register](#) for the next Office Hours on the [website](#).

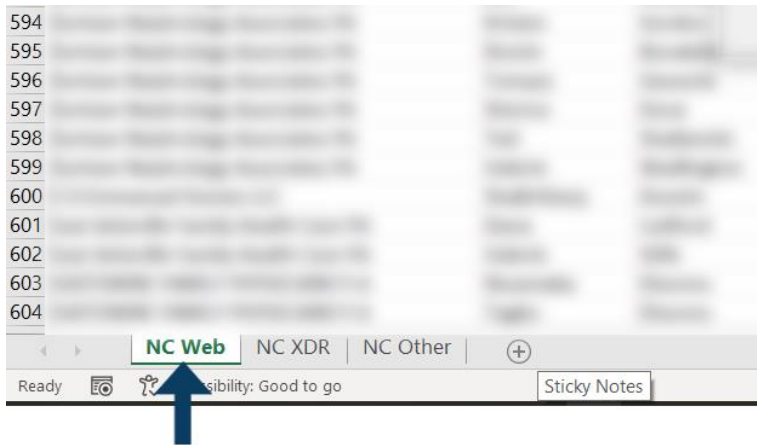
DSM Directory

Let's talk about [DSM](#) and the directory email some of you may receive.

1. Open the attached Excel spreadsheet.
2. Search for your DSM address by holding CTRL + F on your keyboard, then typing in your organization name in the search bar. Make sure to search by "Workbook" NOT by "Sheet."



DSM Directory



Tab 1: NC Web

If your organization appears in **Tab 1** (meaning you have DSM through NC HealthConnex) and you would like to either disable or add any DSM addresses to the directory, please send an email to the NC HealthConnex Help Desk at HIEmail@sas.com and include “DSM Directory Change” as the subject.

Tab 2: NC XDR

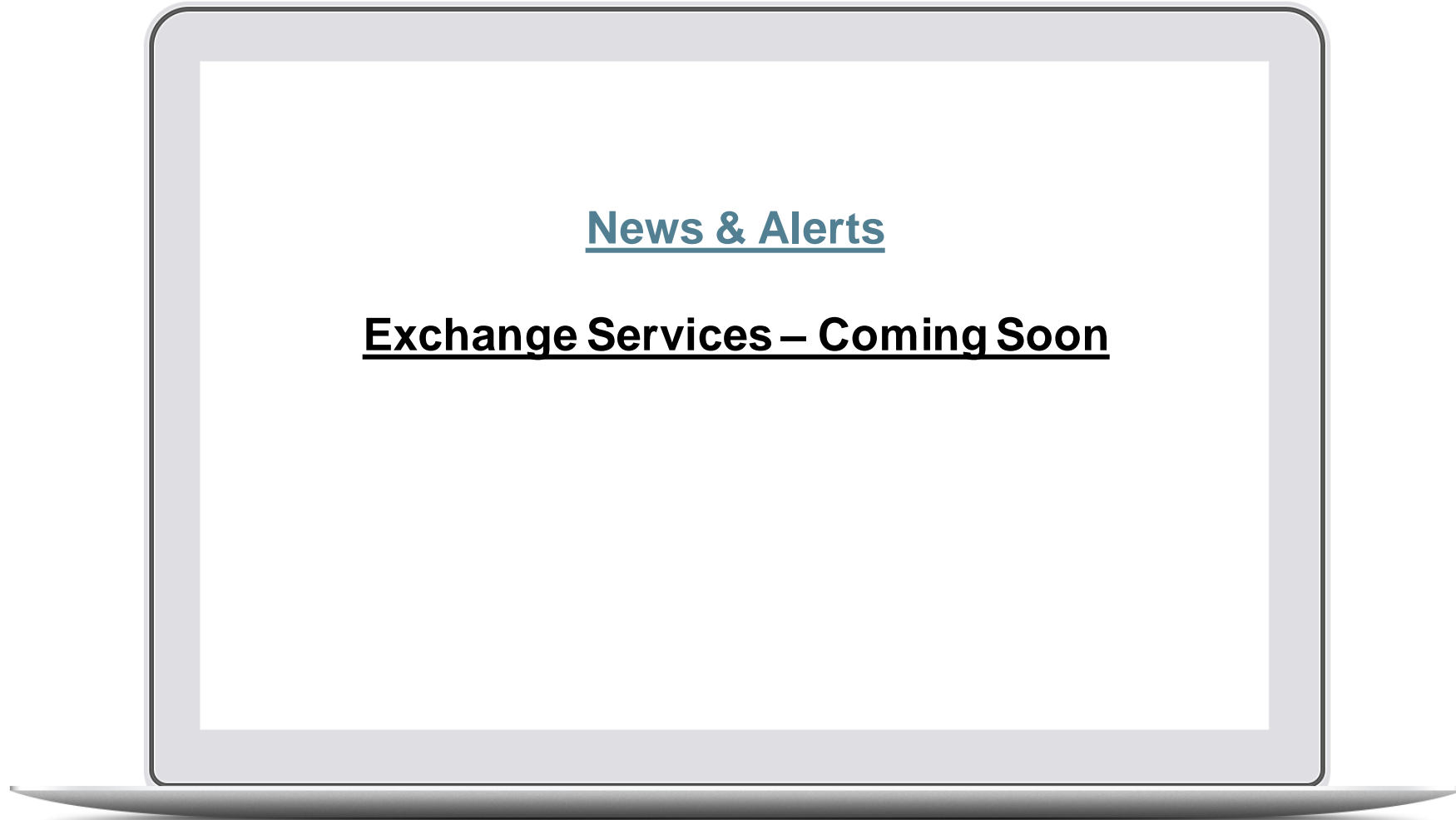
If your organization appears in Tab 2, please use your administrative access to the SES portal to make any changes.

Tab 3: NC Other (HISP)

If your organization appears in Tab 3 (your DSM is through your EMR vendor, please contact your HISP – Health Internet Service Provider (your EMR vendor) to request any changes. Please ask your EMR vendor to report these changes to DirectTrust. The NC HealthConnex Help Desk Team cannot make these changes for you.

Website Walkthrough

New Pages/Updates on the NC HIEA Website



Website Menu Headings

For Patients – Information for patients about how NC HealthConnex benefits them and their choices to opt in/out of health information exchange.

For Providers – Information for providers about connecting to and using NC HealthConnex to improve patient care.

Services – Value-added services available to full participants of the NC HIEA.

NC*Notify – Information about the value-added feature, NC*Notify, the event notification service.

FAQs – Frequently Asked Questions broken down by topic.

About Us – Information about who we are, guiding principles, staff and board members, as well as highlighting accomplishments.

News & Events – Newsletters, press releases, upcoming events and trainings.

Contact – This page is linked at the top blue bar and contains contact information.



Questions?

To offer suggestions or ask a question, email
jessica.hagins@nc.gov.

Upcoming Events...

- Next Teletown Hall [November 15, 2023, 12:00 –1:00 pm](#)
- Office Hours [December 13, 2023, 12:00 – 1:00 pm](#)
- Questions? Contact hiea@nc.gov



Thank You!

Questions or feedback?

919-754-6912

www.nchealthconnex.gov

hiea@nc.gov

Technical Issues:

SAS NC HealthConnex Help Desk

HIESupport@sas.com

Phone: 919-531-2700 or Toll Free: 800-727-0025

