SYNCRONYS
BETTER DATA. BETTER HEALTH.

PORTAL USER ADMINISTRATION—NEW USER CREATION FORM

Fields for setting up a user **Name:**

User ID*	Follow your organization's EMR naming convention with SYNCRONYS'S prefix for your organization. If there is no established naming convention, use: [XYZ-] + [first initial] + [middle initial optional] + [last name] + [*access level for <u>non-clinical roles</u>, if more than one account*], e.g., *XYZ-aljones* or *XYZ-aljones-6c* The User ID can be changed if you make a mistake, but it may only be used once, i.e., you may not use it over for another person.	
First Name*		
Last Name*	Recommended that you add hyphen and role/level number designation to last name, e.g., Jones-1b. This is especially helpful to people with multiple user log in IDs and to administrative users who review lists of other end users.	
E-Mail*		
Add		
Inactivity Timeout	15 minutes is the maximum time allowed, regardless of what is chosen here.	
Description	Strongly recommended, it usually contains a job title, role in the HIE, or other useful information for the user admin and privacy personnel who would search for users.	
Roles user performs (Access Level)*	Move the **NMHIC** role that the user performs to the left side (see list on back). NEW: Please ensure you are selecting from the New Mexico roles indicated by "**NMHIC**" in the name of the role. Other Roles that my organization may need: **Transition Care Manager** or **Transition Care Lead** *(if using the Coordinate Care module)*	
Groups membership	**NEW:** Move the **NMHIC_Tenant** group to the left side of the Groups dialog box. Other Groups that my organization requires: **SYNC_Payer** *for organizations that provide rosters of members or patients.* **Prescription Drug Monitoring Program** *for prescribers.*	**NMHIC_Tenant**
Update Preferences		
Office Phone Number*	SYNCRONYS requires that at least one phone number be entered at the time the user account is created.	
Organization / Site*	You must choose your organization and site combination from the dropdown menu, or the new user will not be associated with your organization. **You will not be able to find this user if you don't complete this step.**	
Start Screen	Only set this if your organization requires you to set a certain home page, e.g., patient search, as you set up clinical users (Levels 1-3)	
Type	**Optional** – You can use the check boxes to indicate that the user works in an Inpatient, Outpatient, or Emergency setting; however, this field is not currently sortable or searchable.	❑ I/P ❑ O/P ❑ ED
eHealth Exchange Gateway Role	This allows a clinical user to access the eHealth Exchange Gateway. Enter a Role, e.g. Physician, Nurse, Pharmacist. **This must not be left blank**, so if you are unsure, use "Administrative Healthcare Staff" as the role.	
Update Preferences		
Password*	Temporary password, the user will be forced to change upon login.	
Close User Details—X	**TIP: Double-check to ensure that you have 1) chosen a New Mexico (NMHIC) Role, 2) have added the NMHIC_Tenant Group, and 3) assigned the user to your organization before closing the User's Details screen!**	

(over)

The fields below should be completed by the end user:

Set Secret Question**	This enables the "Forgot Password" link from the log in screen. Without setting up a secret (security challenge) question, the user will need help desk assistance.
Start Screen	Many clinical users (Levels 1-3) choose to set patient search as their home page.
My preferred Patient ID Type	Users who search for patients by medical record number may want to set a default system for the numbers.
Mobile Phone Number**	This is a second phone number that a user can give to the help desk to confirm his/her identity. The user can add this at first login.
Secret Word**	This is a word or words that a user can give verbally to the help desk to confirm his/her identity. The user can add this word at first login.

**Fields required to create new users.   **Fields end users must populate at first log in.*

Roles:

• NMHIC_Level 1 View *(Obsolete)*	• Clinician view, with Notifications and eHealth Exchange* (Send to My EMR if configured)
• NMHIC_Level 2 View *(Obsolete)*	• Clinician view and eHealth Exchange* (Send to My EMR if configured)
• NMHIC_Level 3 View	• Clinician view and eHealth Exchange*
• NMHIC_Level 4 View	• Front Desk view – Demographics, insurance, and some encounter information, but cannot access anything beyond demographics if consent has not been given
• NMHIC_Level 5b Facility Administrator	• User Administration – No patient data ***Only SYNCRONYS can create these users***
• NMHIC_Level 6b Facility Privacy Officer	• Privacy Auditing, Consent Management, and no medical information ***Only SYNCRONYS can create these users***
• NMHIC_Level 6c Facility Consent Administrator	• Demographics only, no medical information, commonly used for patient registration staff

Note: all portal users have access to portal messaging.

Additional Permission "Groups:"

- Orion Health Communicate Direct Secure Messaging single sign on can be added to any level user with the group, "**Communicate Webmail User**;" contact SYNCRONYS for more information
- Access to the eHealth Exchange Gateway / "External Record" Tab is automatically given to all clinical users, but a "Role" is required in the Exchange Gateway section of the User Details screen when the account is created. If uncertain, use the "Administrative Healthcare Staff" role.
- Access to view images is given to all clinical users, but an additional permission may be granted to those authorized to **import images** to the organization's PACS.
- Access to the New Mexico **Prescription Drug Monitoring Program** (PDMP) may also be added to clinical users who have a valid DEA number; contact SYNCRONYS for more information.
- Authorization to create missing patients is given when authorized by the Privacy Officer and SYNCRONYS by adding the "**Patient Creation**" group to the user. This feature can be applied to any user that can search for patients, i.e., not 5b users.
- The **SYNC-Payer** group should be added to users in MCOs, Insurance companies, or other organizations that are proving member/patient rosters of their patient populations to limit access to only the organization's members; rosters define the list of patients accessible by these users.

Additional Roles:

- The Role of **Transition Care Manager** or **Transition Care Team Lead** may be added to any clinical level user when an organization is using the *Coordinate Care* module.