This is one of four modules applicable to the End User Administrator, or Level 5b user of the SYNCRONYS Health Information Exchange Clinical Portal. Other modules that are useful to this type of user include the Overview of the SYNCRONYS HIE, the module covering how to create new users, and Logging in for the first time.

THIS MODULE COVERS THE LEVEL 5B ROLE END USER ADMINISTRATOR:

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- Your Homepage & Permissions
- Roles (Permissions)
- User Search
- Deactivation & Reactivation
- Renaming a User ID
- Resetting Passwords
- Unlocking Accounts
- Context Navigation

This module covers roles and permissions, how to search for users, how to deactivate and reactivate users, renaming user IDs, resetting passwords, unlocking accounts, and a tool called context navigation.

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The 5b Role user may view, modify, or create users for its own organization using these roles:

- **Level 3** – full clinical access
- **Level 4** – busines staff view – demographics and
- **Level 6c** – consent administrators, demographics only

There are other versions of these clinical roles, and the trainer will instruct you on them if they are applicable to your organization.

A User Administrator can view, modify, deactivate, or create users from his / her own organization in the roles you see on this screen. The most common users will be Level 3 Clinical users and the Level 6c user, formerly referred to as the Consent Administrator. *There are other versions of these clinical roles, and the trainer will instruct you on them if they are applicable to your organization.*
Everything done in the portal is logged against the user and is auditable by the privacy officer.

END USER ADMINISTRATOR, LEVEL 5B

SYNCRONYS

The level 5b may *not* view, create, or modify:

- Level 5a or 5b User Administrators
- Level 6a or 6b Privacy Officers
- Any user outside of his/her own organization
- Any patient information

Your privacy officer can request more administrative users from SYNCRONYS.

An End User Administrator cannot perform a patient search. They also lack the ability to create additional end user admins and privacy officer users or any user outside of his or her own organization. Additional administrative officers may be requested of SYNCRONYS by your privacy officer.
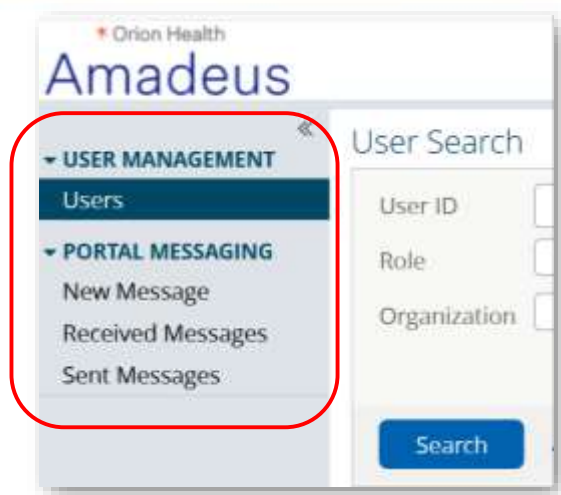
When a user logs into the portal, a homepage appropriate for their assigned role displays. The Menu bar on the left is the primary navigation method in the portal. Each menu item has entry points for specific functions in the portal. The standard level 5b menu items are User Management and Portal Messaging. Portal messages are secure and can be sent to any SYNCRONYS HIE clinical portal user. Portal mail does not accept attachments, but can send links to screens in patient records, making it very useful for clinical users.

YOUR HOME SCREEN – USER SEARCH

SYNCRONYS
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Orion Health
Amadeus

🔔 0   👤 April SALISBURY-SB ▾   LOGOUT

User Search

Select a favorite search ▾

- ▾ USER MANAGEMENT
  - Users
- ▸ PORTAL MESSAGING

User ID: [   ]   Full Name: [First Name(s)] [Last Name]

Role: [▾]   E-mail: [   ]

Organization: [▾]   Show Deleted Users: ⦿ No ○ Yes

[Search] Add Reset [Enter a new favorite search] ⊕

User ID   Full Name   E-mail   Description

Upon login, the user lands on the End User Administrator's home page, User Search

Your home screen is the User Management / User Search screen. A list of your organization's users will come up by default.

YOUR HOME SCREEN – USER SEARCH

You can filter this list or search for specific users by entering information in these fields. To include deactivated users, select the Show Deleted Users Radio Button for Yes before clicking Search. If your search fails, check to make sure you did not include any spaces before or after the search terms you entered.

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- Search the HIE using specific search criteria
  - User ID if known
  - E-mail address

  OR
- Broader searches:
  - Last Name, with or without First Name
  - Wildcard "%" can be used in User ID, Name, or e-mail fields to search
  - Role
- Show Deleted Users – No *(default)* or Yes

The user search is quite flexible. You can search using a specific user ID, or any of the demographic fields or combination of these. A wildcard of a percent sign can also be used.

TO DEACTIVATE/DELETE THE ACCOUNT:

- Search for user to deactivate
- Click delete icon ❌
- Warning message to delete displays
- Select Ok to continue
- User account will be deactivated and will only display in user search if **Show Deleted Users** is selected
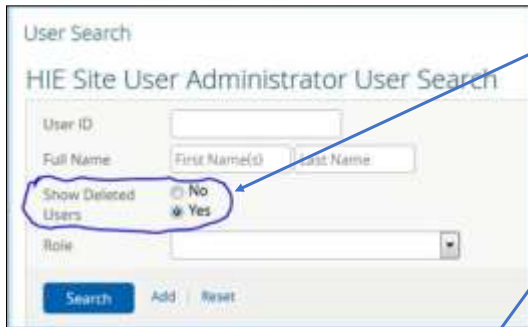
> **TIP**: Before deactivating a user's account, you may want to enter a comment in the user's description field on the Users Details screen for reference.

SYNCRONYS

You can deactivate accounts that are no longer needed by clicking the delete icon, the red circle with the white x. This disables the account and hides it from the standard search. This user ID will remain in the background for auditing purposes and it cannot be used for another individual.   If the same person is given authorization to use the portal again, the account can be "undeleted" in the future.
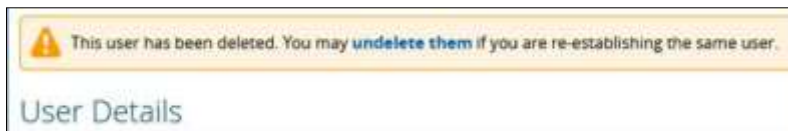
TO REACTIVATE/UNDELETE THE ACCOUNT:

1

2

1. Find the deleted user account by selecting the **Yes** radio button next to "**Show Deleted Users**" in the **User Search** screen.

2. Next, select the account from the list to go to that user's **User Details** screen, and click on the "**undelete them**" link.

To reactivate or Undelete an account that was deactivated in the past, find the account by selecting the Yes radio button next to "Show Deleted Users" in the User Search screen. Next, select the account from the list to go to that user's User Details screen, and click on the blue "undelete them" link. At that point, you may want to reset the password and securely send the user a new password. Remember that for auditing purposes a user account is never really deleted, and that unique username may not be reused for another person.

TO RENAME AN ACCOUNT:

- Search for user to rename
- Click rename icon
- Type in new User ID in the dialog box and click 'OK'
- The original User ID cannot be used again

Should you find that an account was improperly named, you can rename it. Search for the account to be renamed and click the rename icon, which is a blue, circular arrow. Type in a new User ID in the dialog box and click "ok". Remember that for auditing purposes a user account is never really deleted and that the unique username may not be reused, so always double-check usernames for accuracy before saving them.

RESETTING USER PASSWORDS

To reset a password, open the user details screen and click the 'Reset Password' link. Unless you are speaking with the user and they will change it immediately, choose a complex temporary password and convey it securely, e.g., via encrypted e-mail, text message, or voice message, separate from the user ID.

USER AUTHENTICATION VIOLATIONS

Your user account is no longer active. Too many bad login attempts have occurred and the account has been locked indefinitely. Please contact your administrator to unlock the account.

☐ Prevent this page from creating additional dialogs

OK

User ID   as-train6b
Password   ●●●●●●
?   Forgot your password?

a.k.a. "locked-out"

After several attempts to log in, a user may find themselves locked out. You will need to re-enable such an account before resetting the user password.

USER AUTHENTICATION VIOLATIONS

You will see two yellow caution triangles indicating that the account is not active. You will need to re-enable such an account before resetting the user password. Click on the blue Configure link.

USER AUTHENTICATION VIOLATIONS
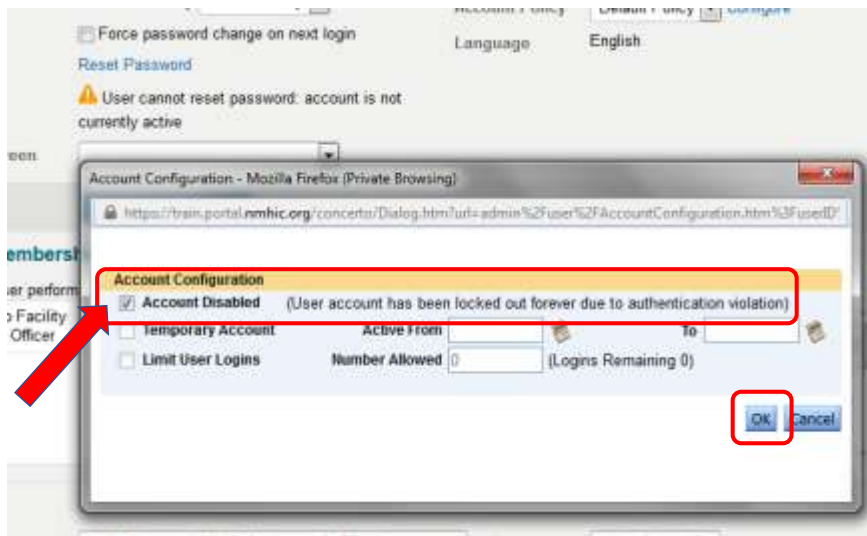
An Account Configuration dialog box pops up, and there you can uncheck the Account Disabled box and click OK. At this point, if the user does not remember his password, you can then reset it with a new temporary password.

CONTEXT BAR NAVIGATION

as-test1 April Salisbury .... research.org ✕ ‹ ☰ ›

User Details

Visible once a user has been selected from the search results showing the User Details screen

- Selected User ID and e-mail address are on left
- Close this user details screen icon ✕
- Previous user icon ‹
- Context icon ☰
- Next user icon ›

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The context bar has navigation tools that are useful for moving from one user details screen to another. If you are accessing multiple accounts, for example to make numerous e-mail address updates, this can be a big time-saver.

CONTEXT BAR NAVIGATION – LIST
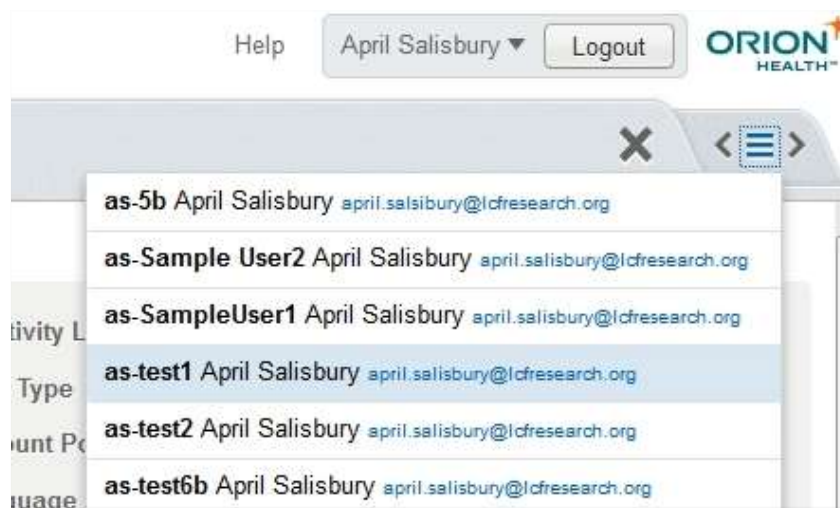
Clicking into the icon with three horizontal lines, sometimes called the 'hamburger', will produce the list of users that were in your user search result list. This will allow you to select another user from the same search result list without having to search again.

We covered:

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Please follow up by viewing
the training modules on New
Account Creation and First Time Login.

REVIEW:

Please follow up by viewing the training on New Account Creation and First Time Login.
Thank you!