

Overview

This Quick Reference Guide is intended for use by authorized SYNCRONYS HIE Clinical Portal End User Administrators (Level 5b Role). If a user's organization has trained administrators, a redirect message will be sent to the user for account access requests.

Typical requests from HIE portal users include:

- ✓ Help to reset passwords.
- ✓ Enable a Disabled account (inactivity deactivations and lock-outs due to authentication violations).
- ✓ Correct the spelling of first and last name or e-mail addresses in the *Users* section
- ✓ Correct other user information, e.g., update an e-mail address.
- ✓ Rename an incorrectly spelled username.
- ✓ Report problems or errors. – These issues should be securely sent to the SYNCRONYS Help Desk via encrypted e-mail or with a phone call.

Do not provide these services without proper authorization, regardless of the requestor's identity validation:

- Modify a **Role Membership** or add **Group Memberships** that would increase a user's access to information, e.g., change a level 6c role to a level 3 role.
- "Undelete" or reactivate a user account that has been deleted (with the exceptions of reactivating an account deactivated by SYNCRONYS due to inactivity or one that was locked/deactivated due to authentication violations, i.e., entering an incorrect password too many times). For Authentication violation lockouts, use the Account Policy configuration dialog box to unlock the user account.

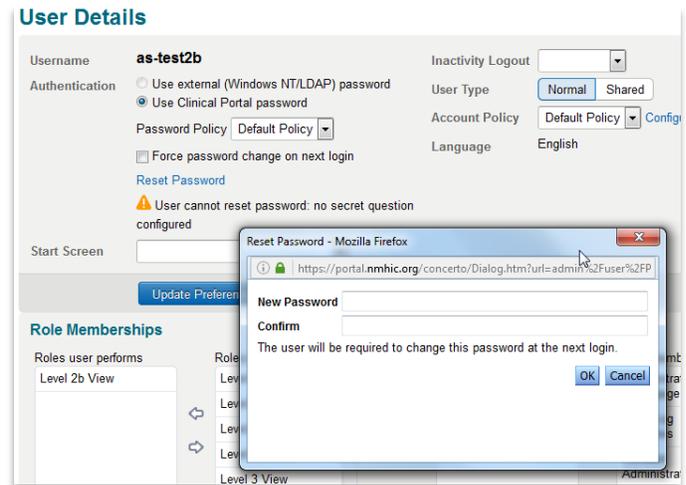
For all Tasks, Locate the User's Details

After validating the identity and employment status of a caller (or via e-mail), search for the person in the **HIE Site User Administrator User Search** screen, which is the level 5b user's home screen. A wildcard symbol "%" may be used in any of the search fields, i.e., User ID, First Name(s), Last Name, E-mail. Searches can also be narrowed by Role.

Note: Completing the Organization and Role fields in the User Search screen does not add these attributes when creating a new user; the fields are only useful as search filters.

Reset password

Select the user from the search list to display the **User Details** screen. In the top left of the screen, below the user's ID, there is a link to **Reset Password**. Click on the link and enter a temporary password twice and click "OK". The password can be simple if the user is in direct contact with the help desk representative and will log in immediately. When the user logs in using the temporary password, he/she will be prompted to change the password before proceeding.



Security Question Set Up:

If you see a caution symbol () below the Reset Password link and a messaging saying the user cannot reset their own password, it means that the user has never gained access to his/her account. Use the opportunity to educate the user about the need to set up his/her security question and complete any of the missing contact information in the **Tenant_NMHIC** section. If possible, have the user try to log in while you are still in direct contact.

Provide SYNCRONYS HIE Clinical Portal end user education

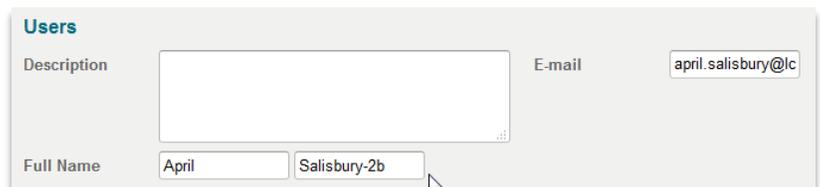
Feel free to remind users that SYNCRONYS offers a training library on our public-facing website, www.syncronys.org in the Onboarding Needs section.

Communicating Temporary Passwords:

Avoid sending both the temporary password and user account in unencrypted e-mail. Send them separately, or mail one and deliver the other by phone or other method. If the client uses encrypted e-mail, you can request they send you a message to which you can reply securely. If none of these are options, use a rigorous password and request that it be changed within 72 hours.

Correct the spelling of first and last name or e-mail addresses in the Users section

Select the user from the search list and the **User Details** screen will be displayed. In the **Users** section, complete the First and Last Name. Take the opportunity to validate the description and e-mail address with the user if time permits. Remember to **Update Preferences** before leaving the screen.



Special Accommodations:

- UNM and SRMC hospitals asks that their clinical users' **Start Screen** be set to Patient Search as the accounts are created. Patient identifiers will be found using the University of New Mexico organization in the preferred patient search drop-down menu. All UNM accounts should use the University of New Mexico organization, not any of the others in the drop-down menu.

Creating New Users

After validating the identity and employment status of a caller (or via e-mail), verify the caller has the authority to request new users by checking the contacts in MSM. Follow the steps in the **Quick Reference Guide: Portal User Administration – New User Creation Form** to create the new user, being careful to assign the organization after choosing a role and updating preferences.

Naming Convention:

SYNCRONYS requires a 3 or 4-letter prefix (**all caps**) followed by a hyphen. The rest of the User ID follows the client's user naming convention. For example, some use a middle initial, and others put the last name first. *TIP: Search for other users in the organization to double-check the client's naming convention before adding the user ID.* If there is no preference and the client will not be using single-sign-on in the future, you may use the first letter of first name followed by last name (all lower case), e.g., CTY-tsawyer

Users with Multiple Accounts:

If a user has more than one log in/account, please use the number/role level as the last character *for their administrative account*, e.g., CTY-tsawyer5b; you should omit this for a clinical account to ensure that it will map correctly in the event that single-sign-on is used with their electronic medical record. Also, for administrative users authorized to have both privacy officer and end user administrator roles, a 5b and 6b role combination is possible and frequently requested in smaller organizations, you may replace 5b6b at the end of the username with "Admin."
Note: a clinical view role (1, 2, or 3) may never be combined with administrative roles.



Renaming User IDs:

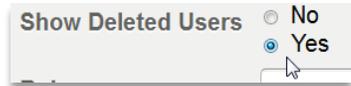
It is possible to rename a User ID by clicking on the blue circular arrow  next to the user name in the search list; however, the overwritten name cannot be used again. [This restriction makes username *the* most important field to double-check for accuracy when creating new users.] Enter the new User ID and click "OK".

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SYNCRONYS HIE Clinical Portal
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Deleting or Deactivating/Undeleting or Re-establishing Users:

Clicking on the  icon next to the user ID in a user search result list will deactivate a user. By selecting the “Yes” radio button in the “Show Deleted Users” section of the User Search Screen, you can find a deactivated user and easily reinstate them if necessary by selecting the user from the search list and clicking on the “[undelete them](#)” link in the User Details screen.



This user has been deleted. You may [undelete them](#) if you are re-establishing the same user.

TIP: It is recommended that you update the user description field before deleting or reinstating an account, to provide transparency to other administrators.

User Details:

If a job title is provided, include that in the **Users / Description** section. The description should not be left blank. SYNCRONYS can refuse to create accounts without a valid e-mail address and one phone number. However, training materials and reminder messages will instruct the user to add a mobile phone number and secret word, and to set up their security question.

Special Users:

Remember that Participating Organization End User Administrators (5b’s) cannot create functional 5a, 5b, 6a, 6b, or 7 level users. These must be authorized by your privacy officer and then manually created by SYNCRONYS. A Level 5b user may initiate creation of the account, but SYNCRONYS must add permissions to make it functional.

Common 5b Issues:

If a Participating Organization’s End User Administrator can’t find a user they just created, it is likely they did not complete these steps before closing the User Details screen:

1. Assign **Roles user performs** in **Role Memberships** making sure it is a New Mexico role, and then [Update Preferences](#).
2. Then go to the **Group Memberships** section and make sure the Tenant_NMHIC group is there – [Update Preferences](#) again.
3. If you cannot see the account you created, please contact the SYNCRONYS Help Desk for assistance rather than starting over. (Help@synchronys.org or 505-938-9999)

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Enable a Disabled account (lock-outs due to authentication violations or SYNCRONYS disabling due to inactivity).

Because the solution is not intuitive, some less-experienced help desk users may not remember how to reset a user that has become locked out due to multiple failed login attempts. Select the user from the search list and the **User Details** screen will be displayed. In the top right section of the screen, there is a link next to Account Policy called **“Configure.”** Clicking on this link brings up a dialogue box. Uncheck the **“Account Disabled”** box and click **“OK”** to enable the account. If possible, have the user try to log in while you are still in direct contact.

