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: [UNM-] + [first initial] + [middle initial optional] + [last name] *for <u>non-clinical roles</u>, if more than one account*], e.g., *UNM-aljones* or *UNM-aljones6b, include the role designation at the end for an administrative role.* 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 for all users, e.g., Jones-3. This is especially helpful to people with multiple user log in IDs and to administrative users who review lists of other end users.~~ Practice discontinued.	
E-Mail*	**Required** to support forgotten password links.	
Add		
Inactivity Timeout	15 minutes is the maximum time allowed, regardless of what is chosen here.	**SKIP**
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. Can be used to document actions on this account, e.g., why it was deactivated and by whom.	
Roles user performs (Access Level)*	Access level roles are determined by your privacy officer. Move the **NMHIC Level** Role that the user performs to the left side (see list on back). Please ensure you are selecting from the roles with "**NMHIC**" in the name. *Disregard the labels, as these are not truly descriptive of the job titles that use them.*	NMHIC Level __
Groups membership	Move the **Tenant_NMHIC** group to the left side of the Groups dialog box. <u>If you close the account before adding this group, you will not be able to find the user's account</u>. In that event, please call our help desk for assistance – 505.938.9999.	Tenant_NMHIC
Update Preferences	PLEASE IGNORE ANY FIELDS OR SECTIONS NOT LISTED ON THIS FORM, E.G., ORGANIZATION NAMESPACE, DISCOVER, NOTIFICATIONS, PRACTITIONER, SAML SSO HBI OUTBOUND, USER EXTERNAL IDENTIFIERS.	
Office Phone Number*	SYNCRONYS requires that at least one phone number be entered **in the Tenant NMHIC** section at the time the user account is created.	
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, typically NMHIC Level 3. End users can modify this as they wish.	
My preferred Patient ID Type	Users who frequently search for patients by medical record number instead of by name and date of birth may want to set a default system for the MRNs they use. Only set this if your organization requires you to.	
eHealth Exchange Gateway Role	This allows a clinical user to access the eHealth Exchange Gateway. This will default to "Administrative Healthcare Staff" as the role; **please update this if you have more specific information**, e.g., Physician, Nurse, Pharmacist.	
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 and 2) have added the NMHIC_Tenant Group 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. No notes, results, or reports are viewable.
• 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, keep the default "Administrative Healthcare Staff" role. Payers must have a Payment role in this field.
- 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 when approved by the Radiology Department.
- Access to the New Mexico **Prescription Drug Monitoring Program** (PDMP) may also be added to clinical users who have a valid DEA number and NPI number; contact SYNCRONYS for more information.
- 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.