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MODULES FOR THE END USER ADMINISTRATOR



This is one of three modules applicable to the End User Administrator, or Level 5b user of the SYNCRONYS Clinical Portal. Other modules that are useful to this type of user include:

- Overview of SYNCRONYS and Initial Login with MFA
- User Administration 5b – Creating New User Accounts, *OR*
- User Administration 5b – Creating New User Accounts for Payers (i.e., insurers and Managed Care Organizations)

Take 3!



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



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

User ID	Full Name	E-mail	Description
SYNC-asalisbury5b	Salisbury-5b, April	asalisbury@syncronys.org	April's 5b User in PROD (MSCC for Testing)



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END USER ADMINISTRATOR, LEVEL 5B



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

- **Level 3** – full clinical access
- **Level 4** – business staff view – demographics and encounters with diagnoses
- **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.



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END USER ADMINISTRATOR, LEVEL 5B



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.



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LEVEL 5B HOMEPAGE MENU



Orion Health
Amadeus

- ▼ USER MANAGEMENT
 - Users
- ▼ PORTAL MESSAGING
 - New Message
 - Received Messages
 - Sent Messages

User Search

User ID

Role

Organization

Search

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YOUR HOME SCREEN – USER SEARCH

Orion Health

Amadeus

USER MANAGEMENT

Users

PORTAL MESSAGING

User Search

Select a favorite search

User ID

Role

Organization

Full Name

First Name(s)

Last Name

E-mail

Show Deleted Users

No

Yes

Search Add Reset Enter a new favorite search

User ID	Full Name	E-mail	Description
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Upon login, the user lands on the End User Administrator's home page, User Search

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YOUR HOME SCREEN – USER SEARCH

Orion Health

Amadeus

USER MANAGEMENT

PORTAL MESSAGING

User Search

Select a favorite search

User ID

Role

Organization

Full Name

First Name(s)

Last Name

E-mail

Show Deleted Users

No

Yes

Search Add Reset Enter a new favorite search

User ID	Full Name	E-mail	Description
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USER SEARCH



- Search the HIE using specific search criteria

- User ID if known
- E-mail address

OR

- Broader searches:


- Complete or partial 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



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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.



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TO REACTIVATE/UNDELETE THE ACCOUNT:



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User Search

HIE Site User Administrator User Search

User ID

Full Name First Name(s) Last Name

Show Deleted Users No Yes

Role

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.

2

This user has been deleted. You may **undelete them** if you are re-establishing the same user.

User Details



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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

User ID	Full Name	E-mail	Description
SYNC-asalisbury	Salisbury-1,	asalisbury@synchronys.org	Train Level 1 - Primary Provider

Rename User

Rename

SYNC-asalisbury6b asalisbury@synchronys.org



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RESETTING USER PASSWORDS

User Details

Username **as-5b**

Authentication Use external (Windows NT/LDAP) password Use Clinical Portal password

Password Policy **Default Policy** ▼

Force password change on next login

[Reset Password](#)

Start Screen ▼

[Update Preferences](#) [Discard Changes](#)



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USER ACCOUNT SETUP REQUIREMENTS

Provider Homepage

Worklist to show on My Homepage

Tenant_NMHC

Mobile Phone Number Office Phone Number

Secret Words

User Attributes

Job Title

SYNCRONYS will insist on having **two phone numbers and a secret word** in the account's profile for before allowing our staff to assist with account access.



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COMPLETE YOUR USER ACCOUNT SETUP

Tenant_NMHIC

Mobile Phone Number Office Phone Number

Secret Words

User Attributes

Job Title

- As a trained **End User Administrator**, you are the main source of assistance for your staff members.
- However, if you cannot assist someone or if you are the one who needs assistance, SYNCRONYS will require the same from you before providing account access.



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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

Password

[? Forgot your password?](#)



a.k.a. "locked-out"



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USER AUTHENTICATION VIOLATIONS UNLOCK ACCOUNT

User Details

Username **as-train6b** ⚠ This account is not currently active.

Authentication Use external (Windows NT/LDAP) password
 Use Clinical Portal password

Password Policy **Default Policy** Force password change on next login

[Reset Password](#)
 ⚠ User cannot reset password: account is not currently active

Start Screen


Inactivity Logout **15 minutes**

User Type **Normal** **Shared**

Account Policy **Default Policy**

Language **English**

Additional Actions **Account Unlock and MFA Management**




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UNLOCK ACCOUNT VIA POPUP WINDOW

MFA Admin - Google Chrome

identity.ohspstage.orionhealthcloud.com/mfa-admin/syncronys/6e625bf1-ec6e-490d-aa66-f4165bc7d...

MFA Admin

as-train6b

User details

Username as-train6b

First name Jane


Last name Doe

Reset MFA

Remove the user's MFA setup. They will be asked to re-enroll again the next time they sign in.

Unlock Account

Unlock the user's account so they can try signing in again.



⚠ This account is not currently active.

Inactivity Logout **15 minutes**

User Type **Normal** **Shared**

Account Policy **Default Policy**

✔ Action completed

Unlock Account completed. The user can attempt login again immediately.



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SUCCESSFULLY UNLOCKED ACCOUNT

User Details

Username: **as-train6b**

Authentication:

- Use external (Windows NT/LDAP) password
- Use Clinical Portal password

Password Policy: TKG Custom Policy

Force password change on next login

Reset Password

Start Screen

Inactivity Logout: [Dropdown]

Global inactivity timeout will restrict this to 15 minutes.

User Type: Normal Shared

Account Policy: Default Policy [Configure]

Language: English

Additional Actions: Account Unlock and MFA Management

Update Preferences Discard Changes

STILL 'NOT ACTIVE' AFTER FIRST UNLOCK?

User Details

Username: **as-train6b**

Authentication:

- Use external (Windows NT/LDAP) password
- Use Clinical Portal password

Password Policy: Default Policy

Force password change on next login

Reset Password

Start Screen

Inactivity Logout: 15 minutes

User Type: Normal Shared

Account Policy: Default Policy [Configure]

Language: English

Update Preferences Discard Changes

⚠ This account is not currently active.

⚠ User cannot reset password: account is not currently active



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USER AUTHENTICATION VIOLATIONS UNLOCK ACCOUNT

⚠ User cannot reset password: account is not currently active

Account Configuration - Mozilla Firefox (Private Browsing)

https://train.portal.nmhc.org/concerto/Dialog.htm?url=admin%2Fuser%2FAccountConfiguration.htm%3FuserID%...

Account Configuration

Account Disabled (User account has been locked out forever due to authentication violation)

Temporary Account

Limit User Logins

Active From: [Dropdown] To: [Dropdown]

Number Allowed: 0 (Logins Remaining 0)

OK Cancel



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SUCCESSFULLY UNLOCKED ACCOUNT

User Details

Username **as-train6b**

Inactivity Logout

Authentication Use external (Windows NT/LDAP) password
 Use Clinical Portal password

Global inactivity timeout will restrict this to 15 minutes.

User Type

Password Policy

Account Policy

Force password change on next login

Language

Reset Password

Additional Actions [Account Unlock and MFA Management](#)

Start Screen



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USER AUTHENTICATION VIOLATIONS VALIDATE MFA PRIOR TO RESET

SAML SSO HBI Outbound

Roles Population Risk Member Search Transition Risk Quality Measures Cost and Utilization
 Hospital Performance Export Capability Behavioral Health Certified Community Behavioral Health

Tenant_NMHC

Mobile Phone Number Office Phone Number

Secret Words Site Types Inpatients Outpatients Emergency

Facility

User Attributes

Job Title User ID

User External Identifiers

External Identifier Type	Value
<input checked="" type="checkbox"/> KC-UUID	10101010101010101010
<input type="checkbox"/>	<input type="text"/>

Do not remove or modify this value.



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USER AUTHENTICATION VIOLATIONS RESET MFA

User Details

Username **as-train6b** ⚠️ This account is not currently active.

Authentication Use external (Windows NT/LDAP) password
 Use Clinical Portal password

Password Policy **Default Policy** Force password change on next login
[Reset Password](#)
⚠️ User cannot reset password: account is not currently active

Start Screen

Inactivity Logout **15 minutes**

User Type **Normal** **Shared**

Account Policy **Default Policy** [Configure](#)

Language **English**

Additional Actions **Account Unlock and MFA Management**

[Update Preferences](#) [Discard Changes](#)



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RESET MFA VIA POPUP WINDOW

MFA Admin - Google Chrome

identity.ohspstage.orionhealthcloud.com/mfa-admin/syncronys/6e625bf1-ec6e-490d-aa66-f4165bc7d...

MFA Admin

as-train6b

User details

Username as-train6b

First name Jane

Last name Doe

Reset MFA

Remove the user's MFA setup. They will be asked to re-enroll again the next time they sign in.

[Reset MFA](#)

Unlock Account

Unlock the user's account so they can try signing in again.

[Unlock Account](#)

⚠️ This account is not currently active.

Inactivity Logout **15 minutes**

User Type **Normal** **Shared**

Account Policy **Default Policy** [Configure](#)

Language **English**

Additional Actions **Account Unlock and MFA Management**

✔️ Action completed
 Reset MFA completed. The user can attempt MFA setup immediately.







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CONTEXT BAR NAVIGATION



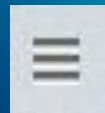
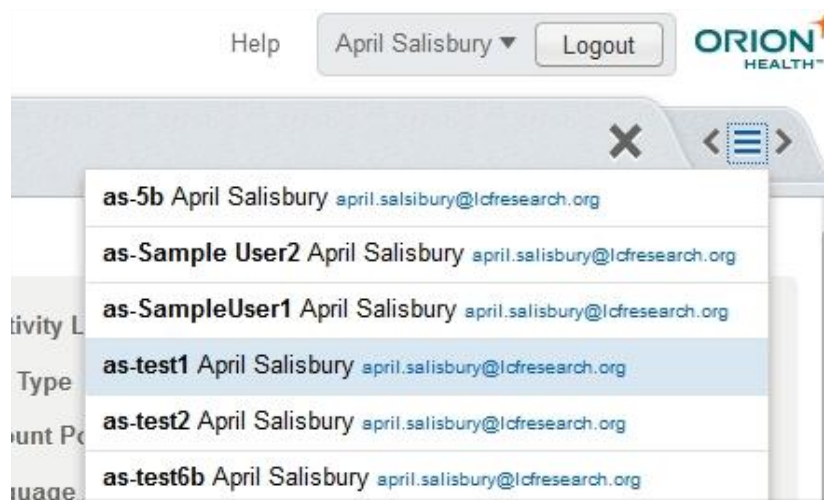
Visible once a user has been selected from the search results showing the User Details screen

- 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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CONTEXT BAR NAVIGATION – LIST



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FOR ACCOUNT ACCESS ASSISTANCE



If you have an internal help desk in your organization, please contact them about account access issues, using your normal service request process.

However, if SYNCRONYS provides your support services for the health information exchange, please contact us 8 AM to 8 PM daily at:

help@SYNCRONYS.org

or **(505) 938-9999** for fastest service.



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TO REPORT PORTAL OR DATA PROBLEMS



- E-Mail or call us with a brief description of the problem or complaint: help@SYNCRONYS.org | (505) 938-9999
- **Do not** send patient identifiable information (protected health information/PHI) in unencrypted e-mail.
- Direct Secure Messaging (DSM) is the preferred method for sending PHI to the help desk. If you have DSM, you can safely send to our direct address after speaking with our staff. Syncronys.HelpDesk@direct.hco.syncronys.net
- Portal Messaging in the HIE clinical portal may also be an option for sharing examples, once you have connected with our staff.
- Simply calling and sharing the example over the phone is helpful.



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We covered:

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



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Please follow up by viewing these other training modules:

- Overview of SYNCRONYS and Initial Login with MFA
- User Administration 5b – Creating New User Accounts *OR*
- User Administration 5b – Creating New User Accounts for Payers (if your organization is an MCO or insurer)



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