

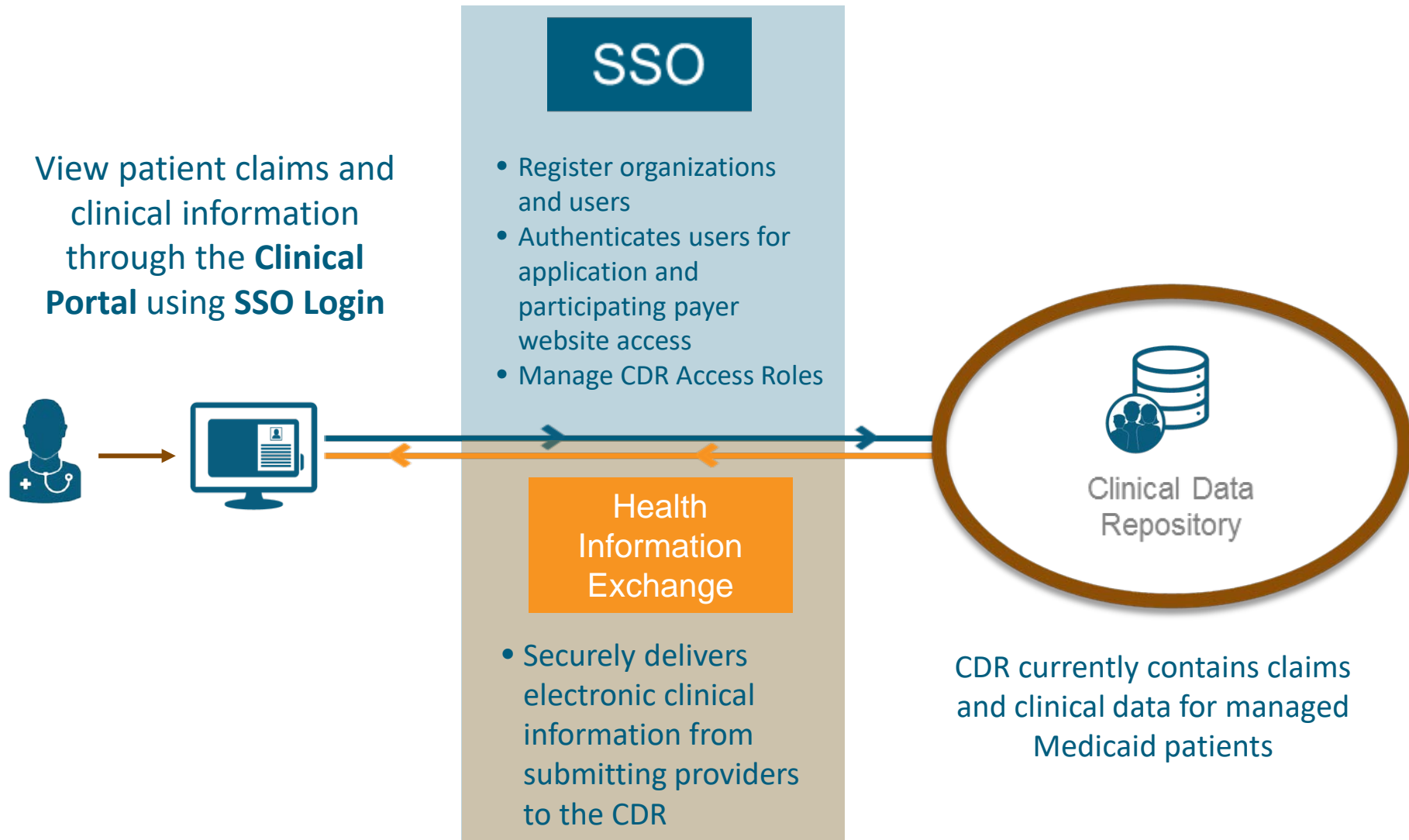


- SSO Administrator Training
- Organization Access to the OneHealthPort Clinical Portal

Agenda

- Overview of the Clinical Portal and Clinical Data Repository
- Multi-Factor Authentication
- Policies
 - Personal Mobile Device Use in the Workplace
 - Clinical Portal Use
- Organization Prerequisites for Clinical Portal Use
- Managing CDR Access Roles

Clinical Data Portal and Clinical Data Repository



Clinical Portal Access Requires Multi-Factor Authentication

What is Multi-Factor Authentication?

- Multi-Factor Authentication (MFA) adds another layer of security to verify a user's identity by combining two factors that identify an individual.
 - What the user knows (such as a username and password)
 - What the user has (such as a phone or tablet device that generates a token)
 - What the user is (such as a fingerprint, iris scan etc.)*
- Not all applications require MFA. Users will be prompted for MFA only when they try to access an application that requires MFA.
- Currently the Clinical Portal requires users to use Google Authenticator as the MFA.

What is Google Authenticator?

- Google Authenticator is a free App that is downloaded to a user's mobile or tablet device that generates a six to eight-digit passcode which must be provided in addition to the username and password to login.
 - The App is free and does not use cell phone minutes or data
 - Users do not need to create Google account

***NOTE: Currently OneHealthPort does not use this type of identity verification to authenticate users.**

Personal Device Policies in the Workplace

- A recent survey of healthcare organizations revealed that a majority of organizations have **policies in the workplace that do not allow use of personal mobile devices** as it may interfere with delivery of patient care.
- Accessing the Clinical Portal requires the use of Google Authenticator on a personal mobile device for the Multi-Factor Authentication.
- If your organization has strict policies against use of personal mobile devices in the workplace, **consider making modifications to those policies to allow personal devices for Multi-Factor Authentication.**

Policy for Clinical Portal Use

- Organization leadership will need to develop policies and administrative procedures regarding:
 - Designation of appropriate individuals for access to the Clinical Portal.
 - Assignment of appropriate CDR access role for designated individuals. See slide *CDR Access Role Guidelines*.
 - Use of personal mobile devices in the workplace for Multi-Factor Authentication.

CDR Access Role Guidelines

Role	Definition and *Confidentiality Level Descriptions as Defined by HL7
No Role Assigned	Subscriber will not be able login to the Clinical Portal.
Test Role Only	Subscriber will be able to login and view UAT (test) environment data in the UAT Clinical Portal, but will not be able to login and view Production data in the Production Clinical Portal.
Normal Access*	Subscriber will be able to view normal or typically non-stigmatizing health information on a patient in the Clinical Portal for data designated as <i>normal confidentiality</i> by the submitting organization.
Restricted Access*	Subscriber will be able to view restricted or additionally protected information on a patient such as sensitive conditions, mental health, HIV, substance abuse, domestic violence, child abuse, genetic disease, and reproductive health; or sensitive demographic information such as a patient's standing as an employee or a celebrity in the Clinical Portal for data designated as <i>restricted confidentiality</i> by the submitting organization.
Very Restricted Access*	Subscriber can view information that is very restricted or extremely sensitive and likely stigmatizing health information that presents a very high risk if disclosed; for example, victim of abuse, patient requested information sensitivity, and taboo subjects relating to health status in the Clinical Portal for data designated as <i>very restricted confidentiality</i> by the submitting organization.

Prerequisites for using the Clinical Portal

To use the Clinical Portal your organization needs:

- A OneHealthPort Single Sign-On (SSO) account
 - Not registered? Go to <http://www.onehealthport.com/sso/register-your-organization>
- A OneHealthPort HIE Participation Agreement
 - Does your organization have an agreement? Go to <http://www.onehealthport.com/hie/participants>
 - No agreement? Go to <http://www.onehealthport.com/contracting>
- Policies for use of personal mobile devices, designating individuals to access the Clinical Portal and assignment of CDR access roles for those users
 - Designated individuals for Clinical Portal use that do not have an SSO account will need to be nominated to become a SSO Subscriber.



OneHealthPort SSO Administrator Training

Managing CDR Access Roles

How To Get To Admin Menu



Manage Your Account

OneHealthPort provides an easy-to-use tool set to manage your account. The quickest and easiest way for you to make a change or fix a problem is with the self-service options below. Before you call support, click on the appropriate links below to manage your OneHealthPort account (your OneHealthPort password), or to manage or unsubscribe to the clinical or administrative tools you access through OneHealthPort. The link will ask you to login to your account in order to access the menus.

Before you call support, you may also test your SSO login.

Password Assistance

If you have forgotten your password, below are the ways to get help:

1. If you have secret questions set up on your account, then you can use them to self-reset your password.
2. If you don't have secret questions, then you should contact your Administrator to assist you. The Administrator logs in through the Administrator Account to get to the password reset function.
3. If you don't know who is your Administrator, then you can contact the OneHealthPort Support desk for assistance.

For Subscribers

A Subscriber can login to manage the following information:

- Update personal information
- Change your email address
- Change your password
- Add or change your secret questions
- View roles and affiliations
- Delete your OneHealthPort account

[Subscriber Login](#)

For Administrators

An Administrator can login to manage the following for their Subscribers and Organization:

- Nominate and manage Subscribers within your Organization, including assisting with password resets
- Change a user name or email address
- Access the Administrator's Guide
- Change your Organization information
- Add Tax IDs
- Add Administrators
- Create Sub-Organizations
- If your Administrator is leaving your Organization, then please review the instruction sheet

[Administrators Easy Reference Sheet](#)

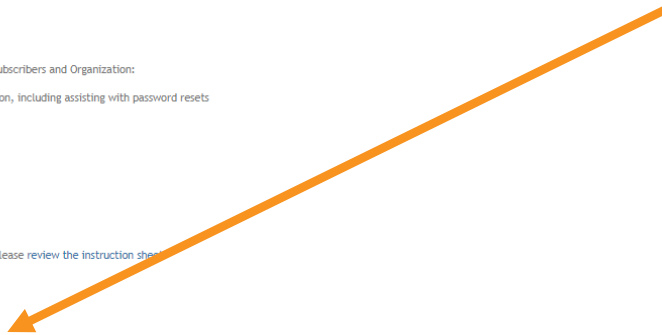
[Resolve Duplicate ID Issues Form](#)

[Administrator Login](#)

GO TO:

<http://www.onehealthport.com/sso/manage-your-account>

Click “Administrator Login”



Manage Subscribers

- SSO Administrators can look-up subscribers or nominate new subscribers designated by their organization to have access to the Clinical Portal.

<http://www.onehealthport.com/sso/manage-your-account>

OneHealthPort

The screenshot shows the 'OHP Administration' page. At the top left is the 'OHP ADMINISTRATION' logo. At the top right is a 'Log Out' button. The main content area is titled 'OHP Administration' and includes a brief description: 'This site allows you to manage the OneHealthPort accounts of all Subscribers and your Organization. You may add and delete Subscriber accounts and edit existing accounts. Additionally you may edit your Organization's profiles and nominate additional Administrators.'

Two menu sections are highlighted with orange arrows and text:

- Subscriber Administration Menu**
 - > **Nominate Subscriber**
Provide an OHP Credential (Subscriber ID) to another person.
 - > **Manage Subscriber**
 - Reset Password
 - Modify Subscriber Profile
 - Affiliate Subscriber
 - Remove Subscriber Affiliation
 - Add Subscriber Roles
 - Remove Subscriber Roles
 - Resend Activation Code
 - Manage CDR Roles

An orange arrow points from the text 'Nominate new subscribers' to the 'Nominate Subscriber' menu item.

- Organization Menu**
 - > Add/Edit Tax ID
 - > Modify Profile
 - > Add Administrator
 - > Remove Administrator
 - > Create Sub-Organization
 - > List Users

An orange arrow points from the text 'Look up current subscribers' to the 'List Users' menu item.

At the bottom of the page, there are three links: 'Click here to download the OneHealthPort Administration Guide.', 'Click here to download the OneHealthPort Administration Step-By-Step Guide.', and 'Click here to download the OneHealthPort Subscriber Step-By-Step Guide.'

The footer contains the text: 'ORGANIZATION AGREEMENT | PRIVACY | ABOUT OHP | CONTACT US'

Manage CDR Access Roles

- Manage CDR Roles option is present if the organization has a HIE participation agreement. If your organization has an HIE participation agreement and you do not see the Manage CDR Roles option submit a [OneHealthPort HIE Support Form](#).

OneHealthPort

The screenshot shows the OneHealthPort Administration interface. At the top left, there is a logo for 'OHP ADMINISTRATION'. On the right, there is a 'Log Out' button. The main content area is titled 'OHP Administration' and contains a paragraph explaining the site's purpose. Below this, there are two main menu sections: 'Subscriber Administration Menu' and 'Organization Menu'. The 'Subscriber Administration Menu' includes options like 'Nominate Subscriber', 'Manage Subscriber' (with sub-options like 'Reset Password', 'Modify Subscriber Profile', etc.), and 'Manage CDR Roles'. An orange arrow points from the text 'Manage CDR Roles' to the 'Manage CDR Roles' link in the menu. Below the menu sections, there are three links to download guides. At the bottom, there is a navigation bar with links for 'ORGANIZATION AGREEMENT', 'PRIVACY', 'ABOUT OHP', and 'CONTACT US'.

OHP ADMINISTRATION

Log Out

OHP Administration

This site allows you to manage the OneHealthPort accounts of all Subscribers and your Organization. You may add and delete Subscriber accounts and edit existing accounts. Additionally you may edit your Organization's profiles and nominate additional Administrators.

Subscriber Administration Menu

- [Nominate Subscriber](#)
Provide an OHP Credential (Subscriber ID) to another person.
- [Manage Subscriber](#)
 - [Reset Password](#)
 - [Modify Subscriber Profile](#)
 - [Affiliate Subscriber](#)
 - [Remove Subscriber Affiliation](#)
 - [Add Subscriber Roles](#)
 - [Remove Subscriber Roles](#)
 - [Resend Activation Code](#)
 - [Manage CDR Roles](#)

Organization Menu

- [Add/Edit Tax ID](#)
- [Modify Profile](#)
- [Add Administrator](#)
- [Remove Administrator](#)
- [Create Sub-Organization](#)
- [List Users](#)

Manage CDR Roles

[Click here to download the OneHealthPort Administration Guide.](#)
[Click here to download the OneHealthPort Administration Step-By-Step Guide.](#)
[Click here to download the OneHealthPort Subscriber Step-By-Step Guide.](#)

ORGANIZATION AGREEMENT | PRIVACY | ABOUT OHP | CONTACT US

The Manage CDR Roles link lists all active subscribers in your organization

CDR Role Administration Screen

- Lists all Subscribers in your organization and their respective CDR role.
- The default role is No Role Assigned.
- CDR Access Roles are only assigned by the SSO Administrator.
- Only **one** CDR Access Role is assigned at a time to a Subscriber.
- CDR Access Roles are terminated when a Subscriber account is disabled or the Subscriber's affiliation is removed from the organization. If you want to remove just the CDR Access Role you must select "No Role Assigned" under Manage CDR Roles.

CDR Role Administration

Modify or remove CDR Roles for Subscribers

OneHealthPort

Subscribers in organizations that participating in the CDR that you are an admin for are shown below. Click on the "Role" field next to a subscriber to change their role. Click "Finish Editing" to go back to the previous page.

The following table describes what each role is for:

Role Name	Description
No Role Assigned	No role is assigned
Test Role Only	Test Role Only
Normal Access	Access to content classified as Normal on the Clinical Portal
Restricted access	Access to Normal and Restricted Clinical Portal content
Very Restricted access	Access to Normal, Restricted and Very Restricted content on the Clinical Portal

Enter text to search... Search Clear

Login	Last Name	First Name	E-Mail	Role
▼ Test Sue's Pain Clinic (s33e0y-00)				
				Very Restricted access
				No Role Assigned
	Titile	Ken		No Role Assigned
				Very Restricted access
				No Role Assigned

Finish Editing

Assign CDR Access Roles to Subscribers

- Assign appropriate CDR access roles to Subscribers **that are authorized** by your organization to view data in the Clinical Portal.
- A Subscriber CDR Access Role be changed if permission to change the level has been granted by the organization.

CDR Role Administration

Modify or remove CDR Roles for Subscribers

OneHealthPort

Subscribers in organizations that participating in the CDR that you are an admin for are shown below. Click on the "Role" field next to a subscriber to change their role. Click "Finish Editing" to go back to the previous page.

The following table describes what each role is for.

Role Name	Description
No Role Assigned	No role is assigned
Test Role Only	Test Role Only
Normal Access	Access to content classified as Normal on the Clinical Portal
Restricted access	Access to Normal and Restricted Clinical Portal content
Very Restricted access	Access to Normal, Restricted and Very Restricted content on the Clinical Portal

Highlight the authorized Subscriber and select the appropriate CDR Access Role from the drop down menu.

Enter text to search... Search Clear

Login	Last Name	First Name	E-Mail	Role
▼ Test Sur's Pain Clinic (s33e0y-00)				
				Very Restricted access
				No Role Assigned
				No Role Assigned
				No Role Assigned
				Test Role Only
				Normal Access
				Restricted access
				Very Restricted access

Completing CDR Access Role Assignment

- Select *Finish Editing* to save the assigned Subscriber CDR Access Role.
- **Note**, if Subscriber CDR Access Role is assigned while Subscriber is logged into their SSO account, the assigned role and Clinical Portal access will not take effect until the next login session.

CDR Role Administration

Modify or remove CDR Roles for Subscribers

OneHealthPort

Subscribers in organizations that participating in the CDR that you are an admin for are shown below. Click on the "Role" field next to a subscriber to change their role. Click "Finish Editing" to go back to the previous page.

The following table describes what each role is for.

Role Name	Description
No Role Assigned	No role is assigned
Test Role Only	Test Role Only
Normal Access	Access to content classified as Normal on the Clinical Portal
Restricted access	Access to Normal and Restricted Clinical Portal content
Very Restricted access	Access to Normal, Restricted and Very Restricted content on the Clinical Portal

Finish Editing

Enter text to search... Search Clear

Login	Last Name	First Name	E-Mail	Role
▼ Test Sue's Pain Clinic (s33e0y-00)				
				Very Restricted access
				No Role Assigned
	Titlle	Ken		No Role Assigned
				Very Restricted access
				No Role Assigned

Finish Editing

Questions



- **Open Issues**
- **Questions from chat**