HealtheConnections Reference Guide: HIE Authorized Users

This guide provides Rochester RHIO participants with helpful information for Health Information Exchange (HIE) Authorized Users transitioning to HealtheConnections.

HIE User Roles and Permissions

Authorized Users should be assigned a role based on their job responsibilities and need for HIE information. Their role determines what they can access. Users must follow consent requirements, organizational policies, and applicable laws. They must also complete required training and attestations, protect their login information, and use the HIE Portal only as permitted by their role.

HIE User Access Role	Access Provided
Clinical Records	• Provides access to available clinical information for users whose authorized job responsibilities require it • Users must access only the information necessary for the patient's care, treatment, or other permitted purposes • Does not provide unrestricted access to all available patient information.
Patient Demographics Only	• Provides access to patient demographic information only • Does not include access to clinical records or other clinical information
Statewide Encounter Alerts (SEAS) Only	• Provides access to SEAS encounter notifications • Does not include general access to clinical records through the HIE Portal
Public Health	• Provides authorized access for public health activities and investigations • Where permitted, access may occur without patient consent • Is limited to approved Public Health Organizations • Does not include access to 42 CFR Part 2 data
Organ Procurement	• Provides authorized access for organ procurement/transplantation activities • Includes access to available 42 CFR Part 2 data
Death Investigation	• Provides authorized access for death investigation activities • Includes access to available 42 CFR Part 2 data

Account Setup and Security

The table below outlines HIE Portal account requirements.

Account Feature	What HIE Authorized Users Need to Know
Account Provisioning	During the Rochester RHIO onboarding process, RHIO Administrators will review and confirm user lists. Once confirmed, the onboarding process for users will begin, and users will receive information about the timeline and next steps. Once this process is complete, new or onboarded users must follow HealtheConnections standard request process: 1. To request access or make changes to an existing account, submit the appropriate request form: • Request access for a new user • Modify an existing user's access • Terminate an existing user's access 2. Once reviewed, HealtheConnections will obtain approval from the organization's RHIO Administrator before creating or updating user access. 3. Users will receive email instructions when their account has been approved.

443 North Franklin St., Suite 001
Syracuse, NY 13204
healtheconnections.org

Authorized User Policies and Procedures	When requesting access to the HIE, Authorized Users must review the required policies and procedures and attest they understand their responsibilities under New York State law. Review the Authorized User Attestation for requirements.
Authorized User Training	Learn to use the HIE portal by attending a live webinar, reviewing HIE user guides, or watching demonstration videos. • HIE Authorized Users are encouraged to attend a live webinar to view demonstrations and ask questions. • Some organizations require live webinar training for their Authorized Users. • Authorized Users may periodically be required to complete additional training or attestations. Instructions will be provided, when applicable.
Password / Security Requirements	Follow the password and security requirements displayed during account setup and password reset. Passwords must be changed every 90 days.
Multi-Factor Authentication (MFA)	MFA is required for HIE Portal access. Follow the prompts during account setup. For additional guidance, review MFA Methods and Setup or MFA FAQs.
Password Reset / Account Unlock	Use the self-service options on the HIE Portal login page to reset your password or unlock your account.
Access to Multiple Organizations	Authorized users approved to access the HIE for more than one organization must select the appropriate organization at login or within the portal. **IMPORTANT**: Patient consent is organization-specific, and users must access records only through the appropriate organization and within their assigned permissions. Unauthorized access may result in sanctions.
Session Timeout	HIE Portal sessions automatically time out after 15 minutes of inactivity to help protect patient information. Users must sign in again to continue.

Support and Resources

Use these resources to learn how to navigate the HIE Portal, complete common tasks, monitor service availability, and contact HealtheConnections when assistance is needed.

Resource	How It Helps
Resource Center	Find user forms, training materials, guides, patient resources, and other frequently used information in the Resource Center.
HIE Help Center	View notices, quick links, and portal-specific resources within the HIE Portal.
System Status Dashboard	Check the System Status Dashboard for known issues and notices.
Support	Contact HealtheConnections by email at support@healtheconnections.org or by phone at 315-671-2241 ext. 5. Additional resources are available at www.healtheconnections.org. • **Business Hours**: Monday through Friday, 7:30 am to 5:00 pm EST • **After-Hours Support**: For urgent issues outside of business hours, call 315-671-2241 ext. 5.

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