



SSO Administrator Training

Organization Access to the OneHealthPort Clinical Portal

Presented by: Jyotsna Rao

Agenda

- Overview of the Clinical Portal
- Log In Using Multi-Factor Authentication
- How to Nominate New Subscribers
- Managing CDR Access Roles

Before We Get Started...

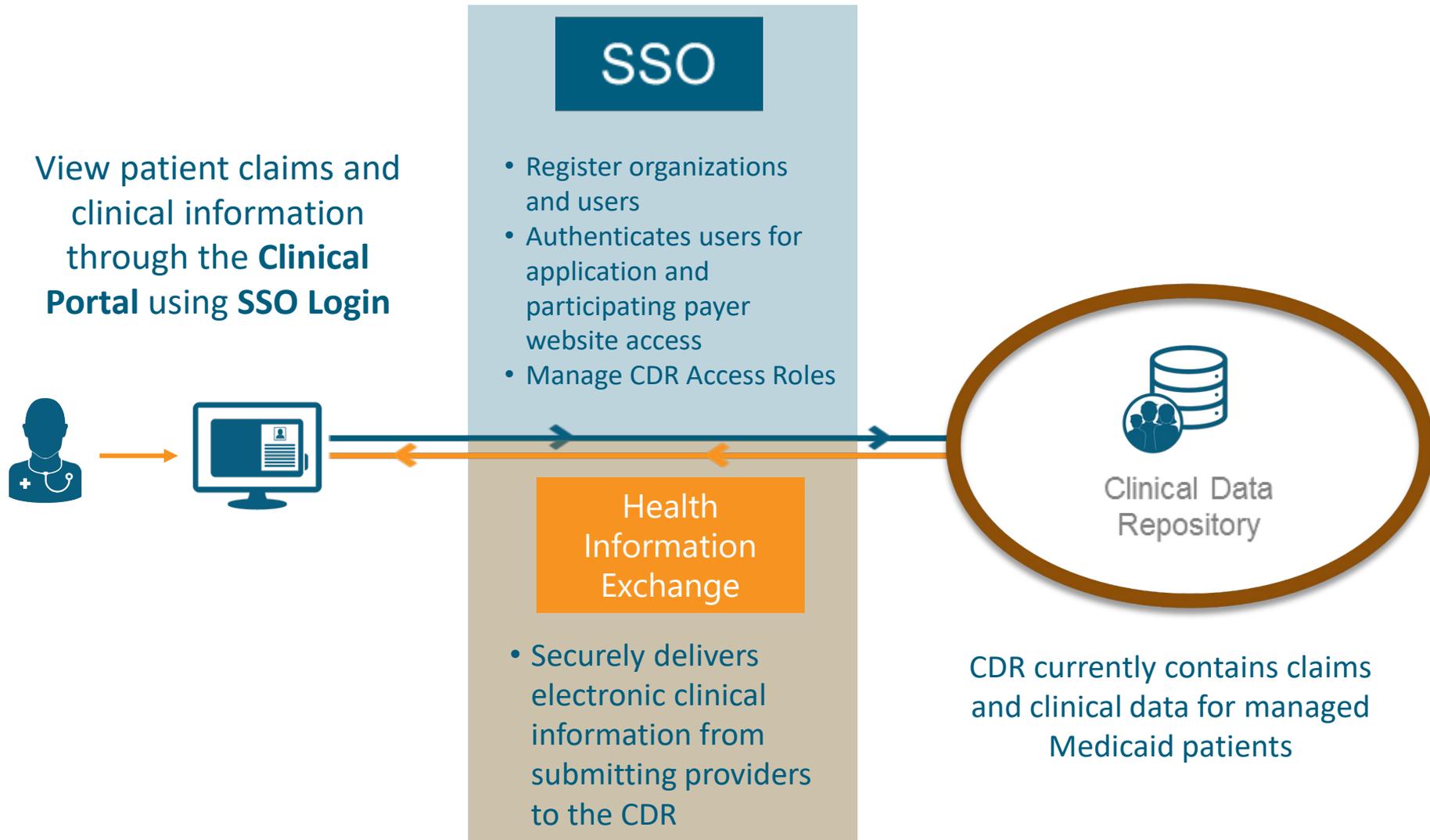
To use the Clinical Portal your organization needs:

1. A OneHealthPort Single Sign-On (SSO) account
2. A OneHealthPort HIE Participation Agreement

If you do not know if your organization has completed the above steps, please reach out to the person within your organization who is responsible for signing contracts to check. You can find additional information at:

<https://www.onehealthport.com/onehealthport-clinical-portal-resources-correctional/detention-facilities>

Clinical Data Portal and Clinical Data Repository





Log In Using Multi-Factor Authentication

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)
- OneHealthPort currently offers two ways users can complete their Multi-Factor Authentication
 - One-Time Passcode (OTP) sent to the user's email (associated with the user's OneHealthPort SSO account)
 - Google Authenticator Token*

*Currently the Clinical Portal requires users to use Google Authenticator as the MFA.

Log in to Administrative Functions

Go to: <https://www.onehealthport.com/sso/manage-your-account>

OneHealthPort | SSO

SSO Home Login Register **Manage Account** MFA Support FAQs About

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
 - OneHealthPort does not routinely expire passwords. However, we do suggest that you change your password whenever you have a concern it may have been used by someone else. OneHealthPort also recommends you change the password once a year as a safety precaution.
- 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
 - OneHealthPort does not routinely expire passwords. However, we do suggest that you change your password whenever you have a concern it may have been used by someone else. OneHealthPort also recommends you change the password once a year as a safety precaution.
- 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](#)

[Administrator Login](#)

Click on
“Administrator Login”

Log in Using Username and Password



Subscriber ID:

Password:

[Login](#)

This login page requires that you have registered as a OneHealthPort Subscriber.

[I'm not a OneHealthPort Subscriber but would like information on subscribing](#)
[Forgot My Password](#)
[Forgot My Subscriber ID](#)

You will be prompted to log in with your OneHealthPort Single Sign-On (SSO) Subscriber ID and password.

Multi-Factor Authentication

 Choose an Authentication Method

The site or application you are trying to access requires Multi-Factor Authentication. Please select an authentication method from the list below.


ONE-TIME PASSCODE


GOOGLE AUTHENTICATOR

[← Back To Login Page](#)

When accessing your administrative functions, a prompt screen will appear. To get started, select either “One-Time Passcode” or “Google Authenticator”.



One-Time Passcode

One – Time Passcode

 Choose an Authentication Method

The site or application you are trying to access requires Multi-Factor Authentication. Please select an authentication method from the list below.

 ONE-TIME PASSCODE

 GOOGLE AUTHENTICATOR

[← Back To Login Page](#)

One-Time Passcode (OTP) Workflow

Passcode Delivery Method

The site or application you are trying to access requires Multi-Factor Authentication. Your passcode will be sent to the email address in your OneHealthPort SSO account. If you want to update the email address, please do that via the [Update Personal Information](#) menu option on the OneHealthPort Subscriber Administration web page.



Email

(:@onehealthport.
com)

 What is this?

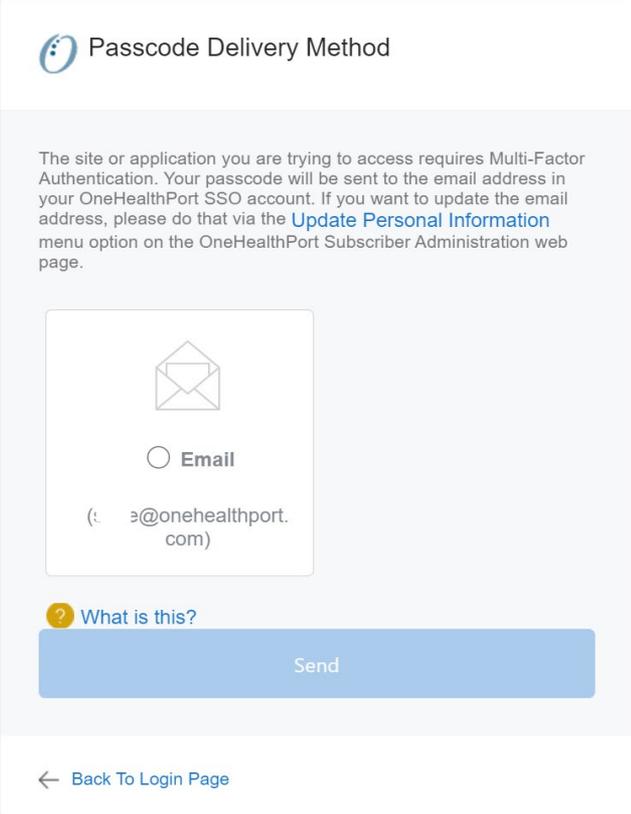
Send

[← Back To Login Page](#)

Next, click on the email associated with your Single Sign-On account and click “Send”.

The email address will be pre-populated with your OneHealthPort Single Sign-On (SSO) account information.

OTP Delivery Confirmation



Passcode Delivery Method

The site or application you are trying to access requires Multi-Factor Authentication. Your passcode will be sent to the email address in your OneHealthPort SSO account. If you want to update the email address, please do that via the [Update Personal Information](#) menu option on the OneHealthPort Subscriber Administration web page.

Email

(: @onehealthport.com)

[? What is this?](#)

Send

[← Back To Login Page](#)

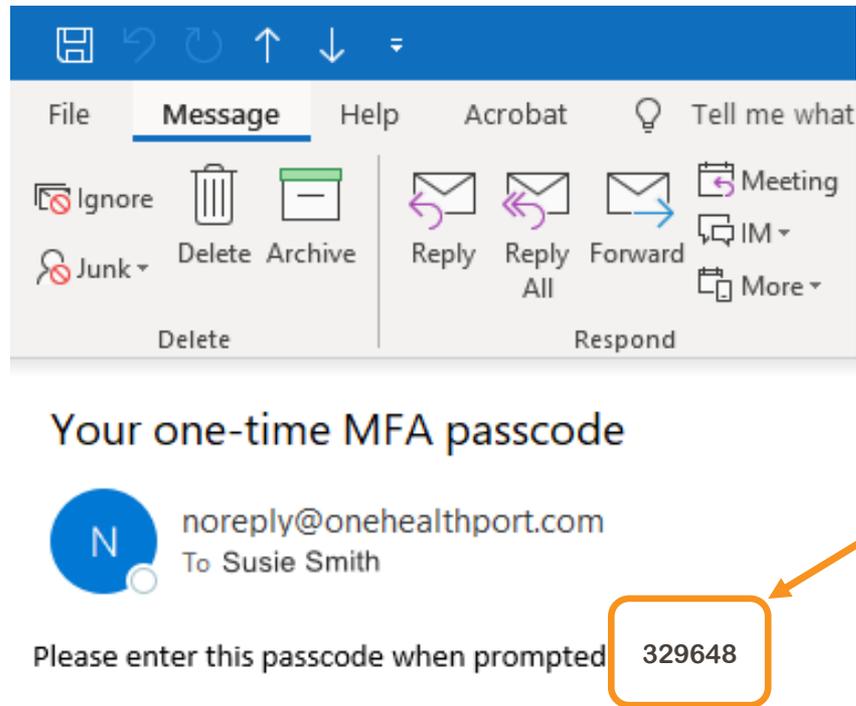
One-time passcode successfully sent



Note: It could take up to two minutes to receive the email with the “One-Time Passcode”. Do not keep clicking on “Send” multiple times as it will result in generation of multiple One-Time Passcodes. If you have not received the email after 2 minutes, check your spam folder. Unblock emails from noreply@onehealthport.com and click send again.

Email With One-Time Passcode

Below is a copy of the email you will receive with the One-Time Passcode:



Ensure that emails from OneHealthPort are not in SPAM folder or blocked by your IT department.

One-Time Passcode (OTP) Workflow

 Passcode Delivery Method

The site or application you are trying to access requires Multi-Factor Authentication. Your passcode will be sent to the email address in your OneHealthPort SSO account. If you want to update the email address, please do that via the [Update Personal Information](#) menu option on the OneHealthPort Subscriber Administration web page.



Email

(@onehealthport.com)

[What is this?](#)

[← Back To Login Page](#)

Scroll down to enter the passcode that was sent to your OneHealthPort SSO email.

 Enter Passcode

To verify your identity, enter the passcode you received via email.

Enter Passcode

Remember my device for up to 60 days on this browser

[← Back To Login Page](#)

One-Time Passcode Verification

 Enter Passcode

To verify your identity, enter the passcode you received via email.

Enter Passcode

 329648

Verify

Remember my device for up to 60 days on this browser

Enter the Passcode from the email into the field and click “Verify”.

Device Registration

Enter Passcode

To verify your identity, enter the passcode you received via email.

Enter Passcode

 329648

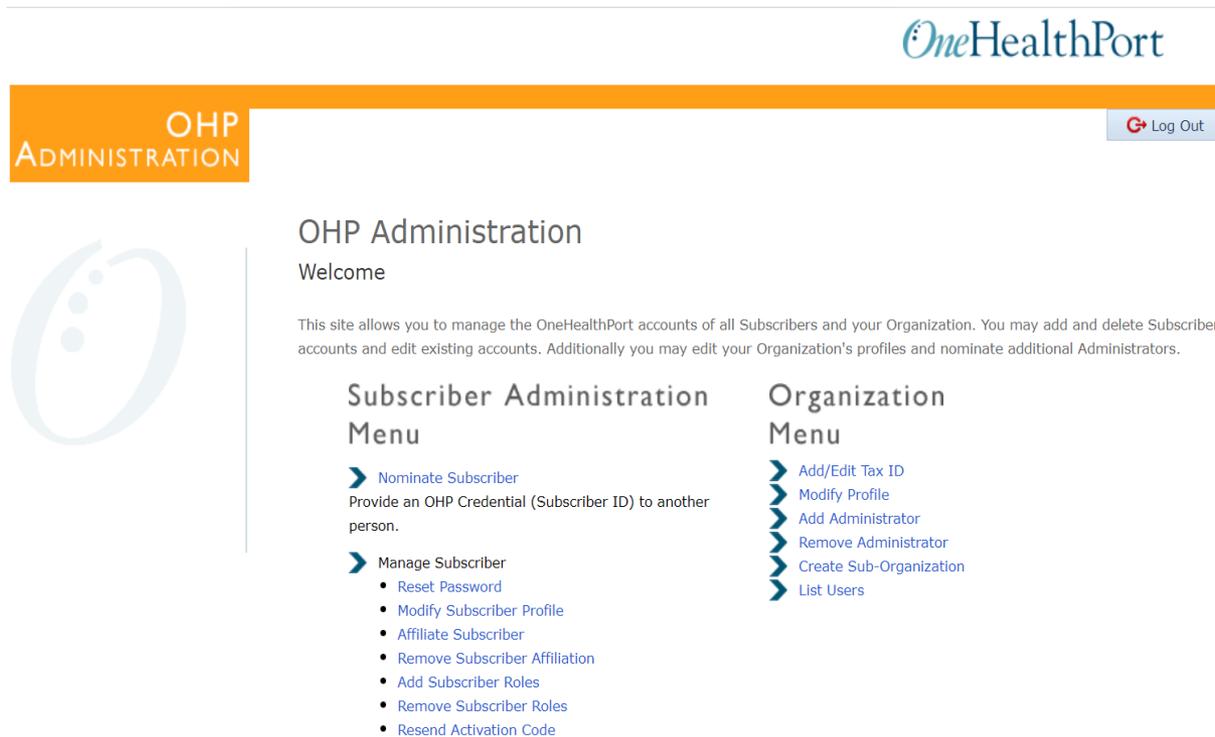
Verify

Remember my device for up to 60 days on this browser

Select this box to register your device. If you use the same computer and browser (without clearing your cache), you won't be prompted for your MFA passcode every time you log in.

Successful Login to the Application

You are all set! If your login was successful, you will be directed to the OneHealthPort application or health plan website*.



The screenshot shows the OneHealthPort OHP Administration interface. At the top right is the OneHealthPort logo. Below it is an orange navigation bar with "OHP ADMINISTRATION" on the left and a "Log Out" button on the right. The main content area is titled "OHP Administration" and "Welcome". A large, faint "OHP" logo is on the left. The main text states: "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." Below this are two menu sections: "Subscriber Administration Menu" and "Organization Menu".

OneHealthPort

OHP ADMINISTRATION [Log Out](#)

OHP Administration

Welcome

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](#)

Organization Menu

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



Google Authenticator

Log in Using Username and Password



Subscriber ID:

Password:

[Login](#)

This login page requires that you have registered as a OneHealthPort Subscriber.

[I'm not a OneHealthPort Subscriber but would like information on subscribing](#)
[Forgot My Password](#)
[Forgot My Subscriber ID](#)

First, you will be prompted to log in with your OneHealthPort Single Sign-On (SSO) Subscriber ID and password.

Multi-Factor Authentication

 Choose an Authentication Method

The site or application you are trying to access requires Multi-Factor Authentication. Please select an authentication method from the list below.



ONE-TIME PASSCODE

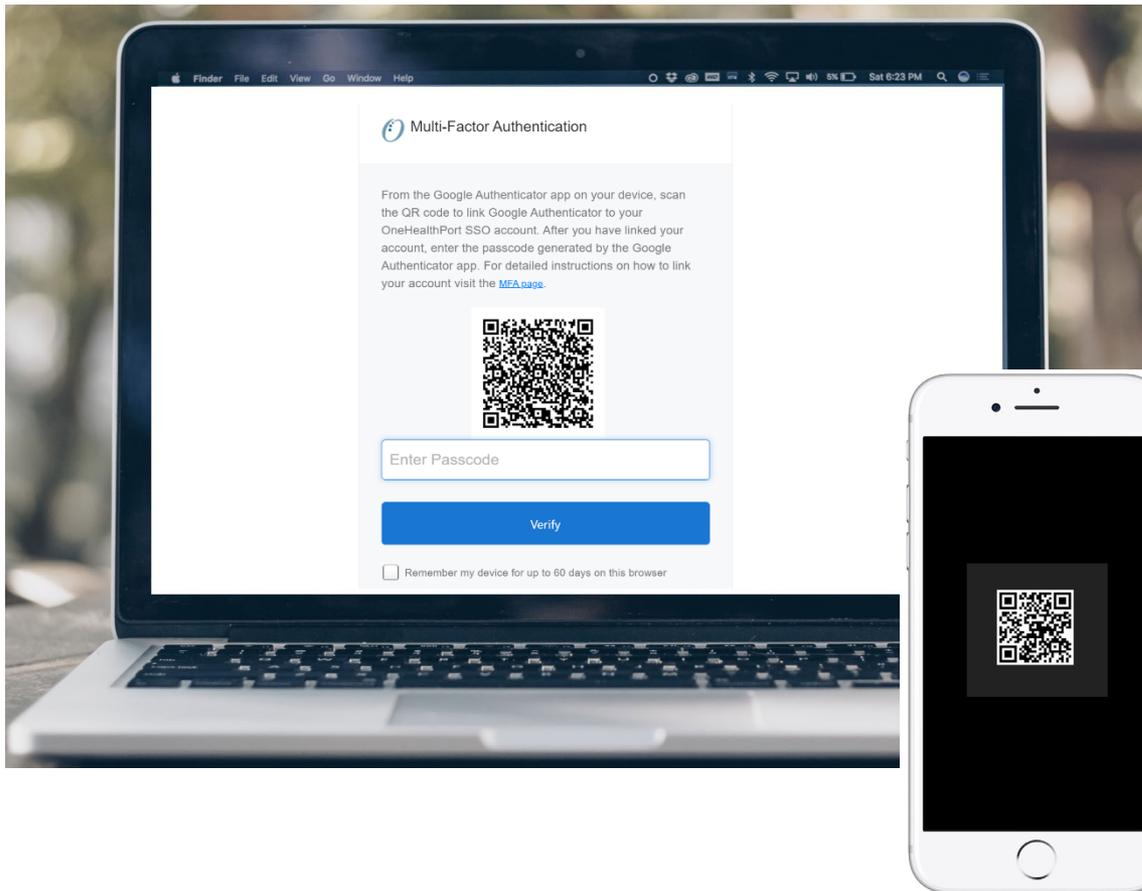


GOOGLE AUTHENTICATOR

[← Back To Login Page](#)

Select "Google Authenticator"

First Time Using Google Authenticator

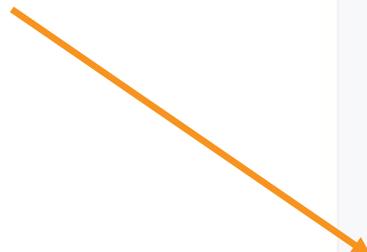
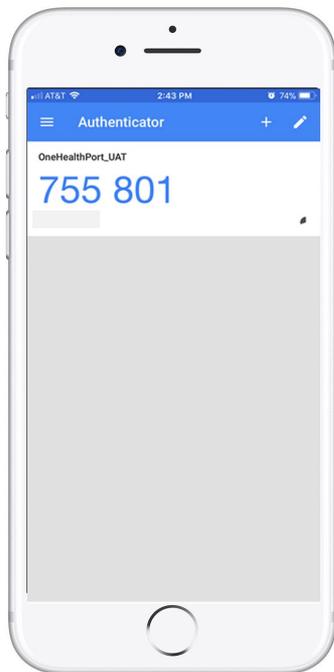


If you are using Google Authenticator for the first time, you will see a QR code.* You will need to download the App before you can begin. Once the App is downloaded you can link your OneHealthPort account by scanning the QR code from your device.

*If you need to link a new device and do not see the QR code, please contact our Help Desk at 1.800.973.4797

MFA Verification Using the Passcode

Open Google Authenticator on your device, enter the passcode and click **“Verify”**. Do not add spaces when entering your passcode.



 Multi-Factor Authentication

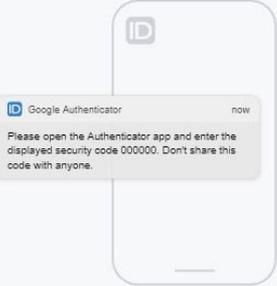
The site or application you are trying to access requires Multi-Factor Authentication. To verify your identity, enter the passcode generated by the Google Authenticator app on your device then press "Verify".

Remember my device for up to 60 days on this browser

Device Registration

 Multi-Factor Authentication

The site or application you are trying to access requires Multi-Factor Authentication. To verify your identity, enter the passcode generated by the Google Authenticator app on your device then press "Verify".



123456

Verify

Remember my device for up to 60 days on this browser

Select this box to register your device. If you use the same computer and browser (without clearing your cache), you won't be prompted for your MFA passcode every time you log in.

Note: Not all applications support Device Registration

Successful Login to the Application

You are all set! If your login was successful, you will be directed to the OneHealthPort application or health plan website*.

The screenshot displays the OneHealthPort OHP Administration application interface. At the top right, the OneHealthPort logo is visible. Below it, an orange navigation bar contains the text "OHP ADMINISTRATION" on the left and a "Log Out" button on the right. The main content area features a large, light blue circular graphic on the left. The heading "OHP Administration" is followed by a "Welcome" message. A paragraph explains that the site allows users to manage OneHealthPort accounts for all subscribers and their organization, including adding and deleting subscriber accounts, editing existing accounts, and managing organization profiles and administrators. Two menu sections are provided: "Subscriber Administration Menu" and "Organization Menu".

OHP ADMINISTRATION Log Out

OHP Administration

Welcome

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](#)

Organization Menu

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

* Note: The above screenshot is an example of one of OneHealthPort's applications.



Nominating a New Subscriber

Administrator Menu



OHP Administration

Welcome

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**
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 - Modify Subscriber Profile
 - Affiliate Subscriber
 - Remove Subscriber Affiliation
 - Add Subscriber Roles
 - Remove Subscriber Roles
 - Resend Activation Code

Organization Menu

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

[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.](#)

Click on "Nominate Subscriber"

Nominating a Subscriber

Subscriber Nomination OneHealthPort

Please click Approve to confirm this acknowledgment

Important Subscriber Nomination Information

As an Organization Administrator nominating a person for a Subscriber account, you are attesting that you have verified the identity of the person this account is being created for and the data you are about to enter accurately represents that person.

Click
"Approve"



Select An Organization OneHealthPort

Select the Organization for this Subscriber

Select Organization

Please select an Existing Organization to affiliate a Subscriber.

Organization:*

Select your organization from the drop-down list

Provide Subscriber Information

The screenshot shows a web form titled "Subscriber Nomination" with the subtitle "Enter Subscriber information". The OneHealthPort logo is in the top right corner. The form is divided into a section titled "Subscriber Demographic Data". It contains three input fields: "First Name:*" with a placeholder "Enter Subscriber's First Name", "Last Name:*" with a placeholder "Enter Subscriber's Last Name", and "E-Mail:*" with a placeholder "Enter Subscriber's E-Mail Address". At the bottom right, there are two buttons: "Cancel" and "Next".

Provide First Name, Last Name and email address of the person you are nominating.

Select Roles

Community Roles
Select the community roles for the Subscriber

OneHealthPort

Community Roles

Please select community role(s) for this Subscriber:*

Role	Description
<input type="checkbox"/> Office worker	
<input type="checkbox"/> Billing specialist	
<input type="checkbox"/> Referral coordinator	
<input type="checkbox"/> Licensed practitioner	Practitioner role necessary for access to ProviderSource.
<input type="checkbox"/> Other service provider	
<input type="checkbox"/> Licensed nurse	Practitioner role necessary for access to ProviderSource.
<input type="checkbox"/> Office manager	
<input type="checkbox"/> QA Report Manager	Role for accessing/managing PSHA quality reports.
<input type="checkbox"/> Medical assistant	
<input type="checkbox"/> Medical Director	
<input type="checkbox"/> Credentialing Manager	Non-practitioner role necessary for data entry access to ProviderSource.
<input type="checkbox"/> Quality Reports and Data Entry	
<input type="checkbox"/> Quality reports (view only)	
<input type="checkbox"/> EFT Administrator	Electronic Funds Transfer administrator.

Cancel Next

NOTE: If none of the above roles apply, select “Office worker”.

Activation Code

The screenshot shows a blue header with the text "Confirmation" and "Confirmation of Subscriber Nomination" on the left, and the "OneHealthPort" logo on the right. Below the header is a white box with a grey title bar that says "Subscriber Nomination Results". Inside this box, the text reads: "A new Subscriber Marie Cole (mcole001) has been added to the Organization Steph Test Clinic d/b/a OneHealthPort (syv484-00) with the following roles:" followed by a bulleted list containing "Office worker". Below the list, it says: "To activate the Subscriber, you must deliver the Activation Code listed below to the Subscriber. An automatic email has been sent to the Subscriber, providing the Subscriber ID and web site link (URL) needed to complete registration. You should make certain that the activation code is received only by this Subscriber." The activation code is displayed as "Activation Code: 173993". A red note at the bottom of the box states: "Note: This activation code will expire in 72 hours. After expiration, you, the administrator, must log into the Organization Administration page to get a new activation code (via Resend Activation Code Menu item)". A "Close" button is located in the bottom right corner of the white box.

Confirmation
Confirmation of Subscriber Nomination

OneHealthPort

Subscriber Nomination Results

A new Subscriber Marie Cole (mcole001) has been added to the Organization Steph Test Clinic d/b/a OneHealthPort (syv484-00) with the following roles:

- Office worker

To activate the Subscriber, you must deliver the Activation Code listed below to the Subscriber. An automatic email has been sent to the Subscriber, providing the Subscriber ID and web site link (URL) needed to complete registration. You should make certain that the activation code is received only by this Subscriber.

Activation Code: **173993**

Note: This activation code will expire in 72 hours. After expiration, you, the administrator, must log into the Organization Administration page to get a new activation code (via Resend Activation Code Menu item)

Close

Please note down this Activation Code and give it to the Subscriber you are nominating.



Managing CDR Access Roles

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 all 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 only clinical documents classified as normal by the submitting organization. Normal is typically used with non-stigmatizing health information on a patient in the Clinical Portal.
Restricted Access*	Subscriber will be able to view clinical documents classified as normal and restricted by the submitting organization. Restricted is typically used with 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.
Very Restricted Access*	Subscriber can view all classifications of clinical documents including those classified as very restricted by the submitting organization. Very restricted is typically used with 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.
Recommended*	

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.

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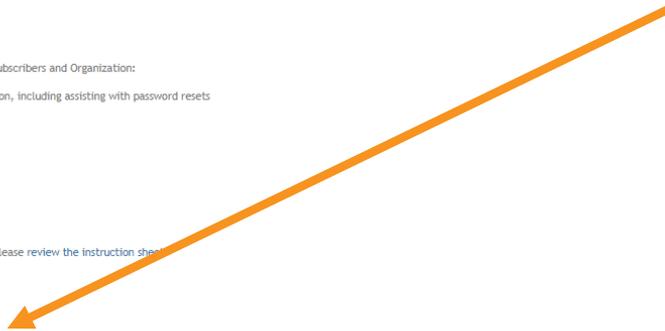
[Resolve Duplicate ID Issues Form](#)

[Administrator Login](#)

GO TO:

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

Click “Administrator Login”



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

OHP ADMINISTRATION

OHP Administration

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 - [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](#)

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

Manage CDR Roles

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.

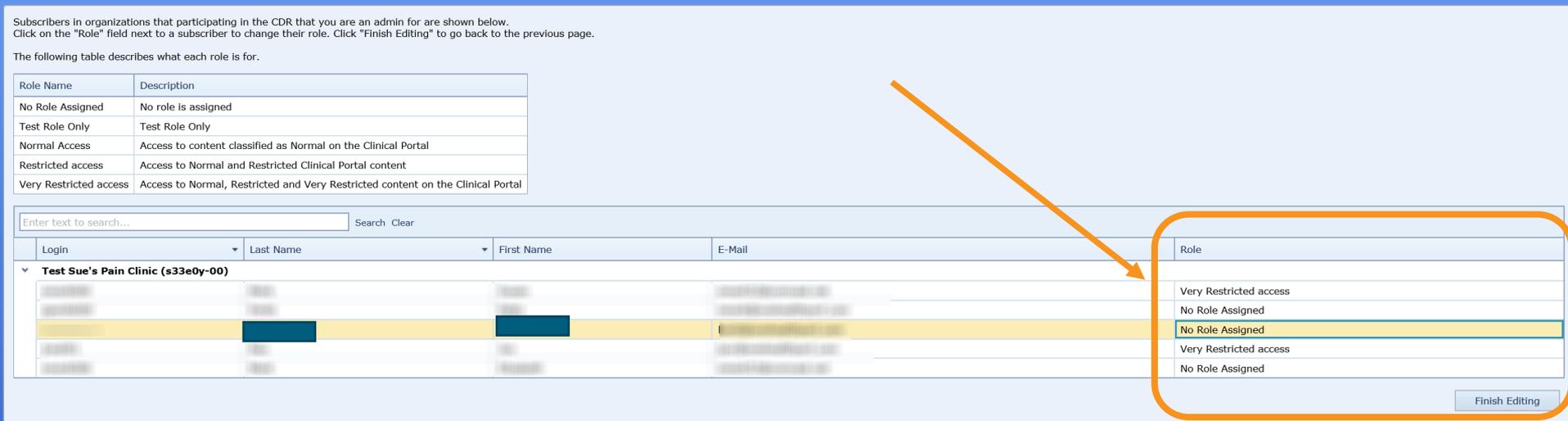
The following table describes what each role is for.

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)				
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Very Restricted access
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	No Role Assigned
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	No Role Assigned
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	Very Restricted access
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	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.

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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 Sue'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
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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
				No Role Assigned
				Very Restricted access
				No Role Assigned

Finish Editing

Questions





Appendix

SSO Administrator Responsibilities

The SSO Administrator manages the OneHealthPort account for their participating organization

- Nominating staff members to be OneHealthPort Subscribers
- Modifying or deleting Subscriber affiliations and roles for a Subscriber
- Resetting passwords for Subscribers
- Maintaining the participating organization's information including affiliation (Tax IDs and other data) in an accurate and timely fashion
- Maintaining the Subscriber list
- Ensuring each Subscriber from their organization has a unique Subscriber account and email address on their OneHealthPort account
- Ensuring that the participating organization has at least one other Administrator in place in case the original Administrator is unavailable to perform his/her duties or has left the organization