



# CRISP LogOnce Training

User Management for CRISP Reporting Services – Panel  
POCs

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# CRS POC Responsibilities

- Manage user activation and CRS report permissions for your Panel
- Deactivate users as appropriate
- Respond to CRISP audit requests as appropriate
- Recertify users every 90 days per CRISP security requirement

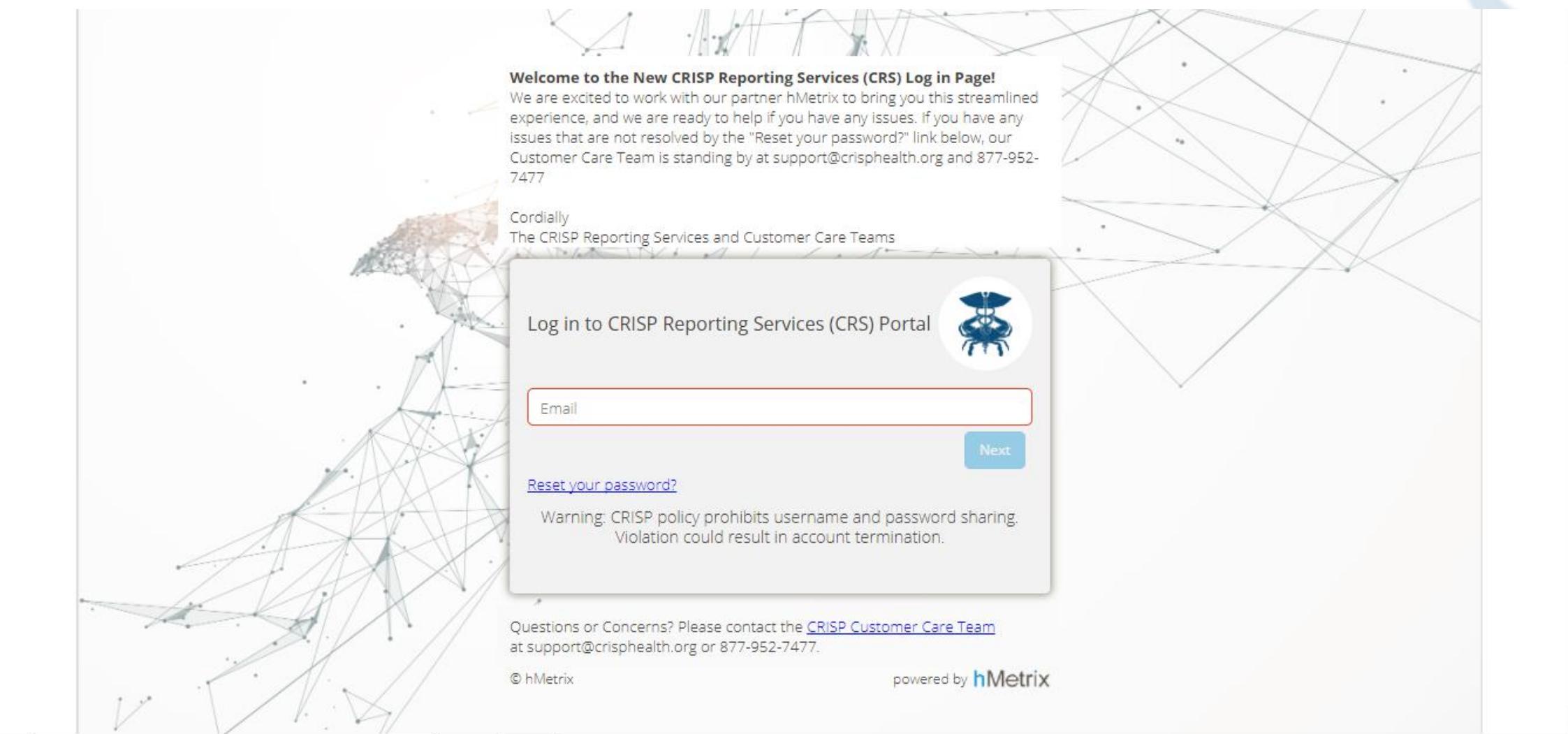


# Why LogOnce?

- Existing CRS Credentialing
  - Email-based approvals with back-and-forth between CRISP, users & POCs
  - Users experience access delays
  - Security concerns
- Why LogOnce?
  - Streamlines and decentralizes the credentialing process
  - POCs have more control over users
  - Shortens turnaround time for report access
  - Enhanced security



# CRS Portal Login Page - <https://reports.crisphealth.org>



Welcome to the New CRISP Reporting Services (CRS) Log in Page!

We are excited to work with our partner hMetrix to bring you this streamlined experience, and we are ready to help if you have any issues. If you have any issues that are not resolved by the "Reset your password?" link below, our Customer Care Team is standing by at [support@crisphealth.org](mailto:support@crisphealth.org) and 877-952-7477

Cordially  
The CRISP Reporting Services and Customer Care Teams

Log in to CRISP Reporting Services (CRS) Portal

[Next](#)

[Reset your password?](#)

Warning: CRISP policy prohibits username and password sharing.  
Violation could result in account termination.

Questions or Concerns? Please contact the [CRISP Customer Care Team](#) at [support@crisphealth.org](mailto:support@crisphealth.org) or 877-952-7477.

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# CRISP Credentialing = LogOnce

The image shows two screenshots of the CRISP Reporting Services interface. The left screenshot is the 'Your Dashboard' page, featuring a grid of cards for 'All-Payer Population', 'Medicare Population', 'HSCRC Regulatory Reports', 'MDPCCP Reports', 'Administration Reports' (which is highlighted with a red box and a red arrow), and 'Public Health'. Below the grid are 'Introduction' and 'Favorites' cards. The right screenshot is the 'Favorites' page, which lists 'CRISP Credentialing' (with a red heart icon) and a link to 'Administration Reports'. A red arrow points from the 'Administration Reports' card on the dashboard to the 'CRISP Credentialing' entry on the Favorites page.

Click the wrench and spanner icon to view a full list of cards available to you.

Favorited Reports will appear here when you login.

The card titled 'Administration Reports' will take you to the Report Finder Page. 'CRISP Credentialing' will appear, which is the access point for the LogOnce credentialing system.



# POC User Management Tools in LogOnce

CRISP REPORTING SERVICES

Download HSCRC Regulatory Reports Help Report Updates Kaeding, Grace Logout

Search Reports...

Populations & Programs

All-Payer Population

Medicare Population

HSCRC Regulatory Reports

MDPCP Reports

Administration Reports

Public Health

Introduction

Favorites

Reports

CRISP Credentialing

Click on a report to display more details

Click the heart icon to favorite a report. A red heart means the report has been favorited.

CRISP Credentialing will appear in the second tier of reports. Click the Application Links icon to launch the LogOnce Application.



# Accessing a Panel

Click on the name of your Panel on the left side-bar.

CRISP Credentialing

Utilization Reports Search User... Kevin Test

Test Organization - User Management

Add User Edit User Assign User Reset Password Deactivate User

User Name	First Name	Last Name	Email	Active	EUA Submi...	Photo ID S...	Update Date	User Class	Primary Account Na...
kephil1@umbc.edu ★	Kevin	Test	kephil1@umbc.edu	Yes	No	No	05/11/2018	Hospital POC	



# Creating a User



Utilization Reports Search User... Kevin Test

Test Organization - User Management

Add User Edit User Assign User Reset Password Deactivate User

User Name	First Name	Last Name	Email	Active	EUA Submi...	Photo ID S...	Update Date	User Class	Primary Account Na...
kophil1@umbc.edu	Kevin	Test	kophil1@umbc.edu	Yes	No	No	05/11/2018	Hospital POC	

Export Users Upload User

Create a user by clicking the 'Add User' button. Enter the information in the popup box to create the user. The email address entered will become the username.

**Create User**

User Class:  End User

Email:

User ID:

First Name:

Phone:

Last Name:



# Assigning User Permissions

**Edit User**

User Class:  End User

Email: kephil1+test1@umbc.edu User ID: kephil1+test1@umbc.edu

First Name: Kev Phone:

Last Name: test 2

Applications & User Attributes

Casemix Reports Medicare CCLF

Attribute: usergroup

*Note: Changes done to below grid are saved automatically.*

Name	Description
<input type="checkbox"/> PanelID_PanelNonPHI	User can access pre/post analytic report.
<input type="checkbox"/> PanelID_PanelPHI	User can access panel for practices report
<input type="checkbox"/> Test_User	Access to Test User reports

Cancel Save

Once a User is created, a POC will be able to assign report permissions to a user.



# Granularity of Reporting Roles

- Reporting Roles is broken up by type and by PHI or non-PHI
- Types:
  - Panel Reports





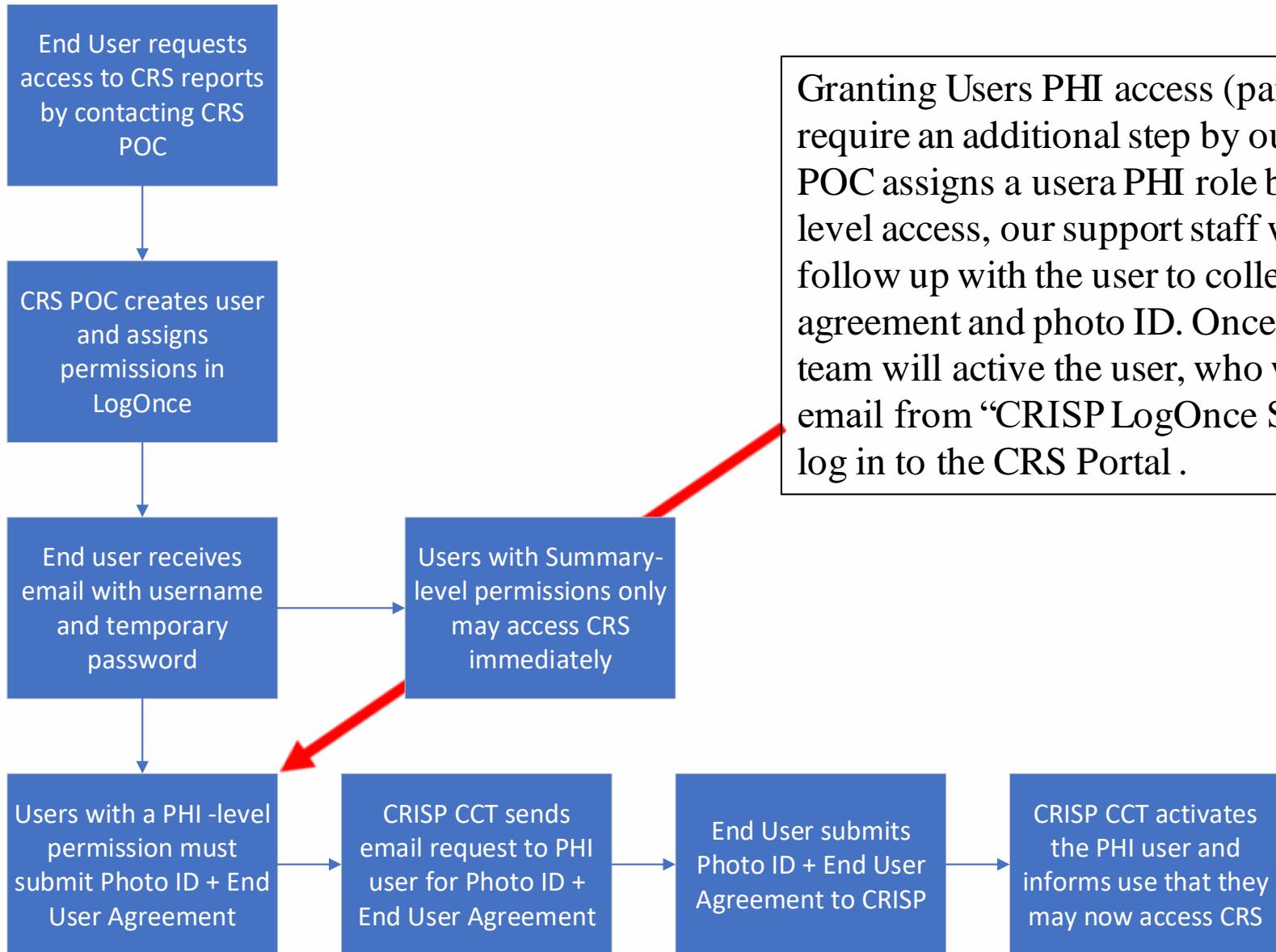
# Granularity of Reporting Roles – All Payer Reports

## All-Payer Reports

Report	Description	Credentialing Application Role
<b>Panels for Practices</b>	Panels for Practices enables users with an ENS panel, and specifically Ambulatory Providers, to monitor the utilization and cost of their patients.	<a href="#">PanelID.PanelPHI</a>
<b>Pre/Post Analysis</b>	Pre/Post is used to monitor care management programs. It compares utilization and charges for a given panel of patients before and after enrollment in a program.	<a href="#">PanelID.PanelNonPHI</a> <a href="#">PanelID.PanelPHI</a>

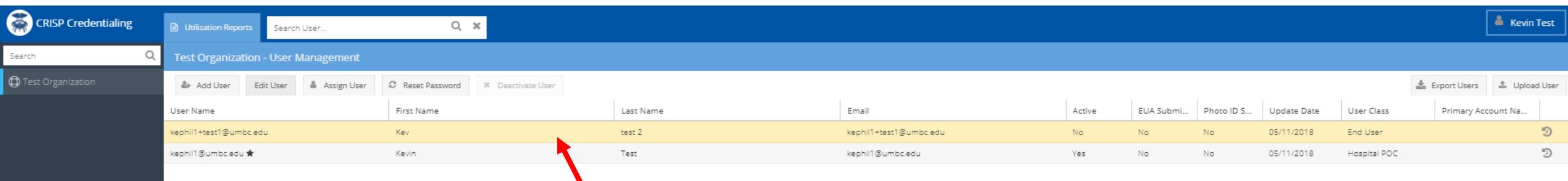


# CRS Credentialing Workflow





# Assigning User Permissions



The screenshot shows the 'Test Organization - User Management' page. The top navigation bar includes 'Utilization Reports', a search bar, and a user dropdown for 'Kevin Test'. Below the header is a toolbar with buttons for 'Add User', 'Edit User', 'Assign User', 'Reset Password', and 'Deactivate User'. The main area is a table with columns: User Name, First Name, Last Name, Email, Active, EUA Submi..., Photo ID S..., Update Date, User Class, and Primary Account Na...'. Two rows are visible: one for 'kephill1+test1@umbc.edu' with values 'Kev', 'test 2', 'kephill1+test1@umbc.edu', 'No', 'No', 'No', '05/11/2018', 'End User', and a 'Edit' icon; and another for 'kephill1@umbc.edu' with values 'Kevin', 'Test', 'kephill1@umbc.edu', 'Yes', 'No', 'No', '05/11/2018', 'Hospital POC', and a 'Edit' icon.

User Name	First Name	Last Name	Email	Active	EUA Submi...	Photo ID S...	Update Date	User Class	Primary Account Na...
kephill1+test1@umbc.edu	Kev	test 2	kephill1+test1@umbc.edu	No	No	No	05/11/2018	End User	
kephill1@umbc.edu	Kevin	Test	kephill1@umbc.edu	Yes	No	No	05/11/2018	Hospital POC	

To assign additional role once a user has been created, **Double click** on the user that you just created in the grid to edit the user's permissions.



# Assigning User Permissions

Under 'Applications & User Attributes' choose Attribute = usergroup. Next, select report permissions for the user. Tabs separate the groups of permissions by data source.

Click Save.

**Edit User**

User Class:  End User

Email:  User ID:

First Name: Kev Phone:

Last Name: test 2

Applications & User Attributes

Attribute: usergroup

Note: Changes done to below grid are saved automatically.

Name	Description
<input checked="" type="checkbox"/> PanelID_PanelNonPHI	User can access pre/post analytic report.
<input checked="" type="checkbox"/> PanelID_PanelPHI	User can access panel for practices report
<input type="checkbox"/> Test_User	Access to Test User reports

**Cancel** **Save**



# Assigning User Permissions to Multiple Hospitals/Panels

CRISP Credentialing

Utilization Reports

Kevin Phillip

MedStar Harbor Hospital - User Management

Add User Assign User Reset Password Activate User Deactivate User Update Documents Export Users Upload User

User Name	First Name	Last Name	Email	Active	EUA Submi...	Photo ID S...	Update Date	User Class	Recertify
kephil1@umbc.edu ★	Kevin	Phillip	kephil1@umbc.edu	Yes	No	No	01/22/2018	Hospital POC	✓ ⏺
				Yes	No	No	01/17/2018	End User	✓ ⏺
				Yes	Yes	Yes	01/22/2018	End User	✓ ⏺
				Yes	No	No	01/17/2018	End User	✓ ⏺
				Yes	Yes	Yes	01/17/2018	End User	✓ ⏺

If you are POC for more than one hospital facility or panel organization, you may assign an existing user to a second hospital using the Assign User button.

To assign a user to a second hospital, click the Assign User button. Enter the user ID (the email of the user) and click 'Assign.' You must be the POC for both organization take this action. If you are not POC for both organizations, you will get an error message.

\*Pro Tip - users who are assigned across multiple hospitals will be noted with a star symbol after their username.

Search

Fort Washington Hospital

Frederick Memorial Hos...

Garrett County Memori...

Greater Baltimore Medi...

Holy Cross Germantow...

Holy Cross Hospital

Howard County General...

Johns Hopkins Bayview ...

Johns Hopkins Hospital

Levindale Hospital

McCready Memorial Ho...

MedStar Franklin Squar...

MedStar Good Samarita...

MedStar Harbor Hospital

MedStar Montgomery ...

MedStar Saint Marys Ho...

MedStar Southern Mary...

MedStar Union Memori...

Mercy Medical Center

Meritus Medical Center

Northwest Hospital Cen...

Other Hospital

Peninsula Regional Med...

Saint Agnes Hospital

Page 1 of 1

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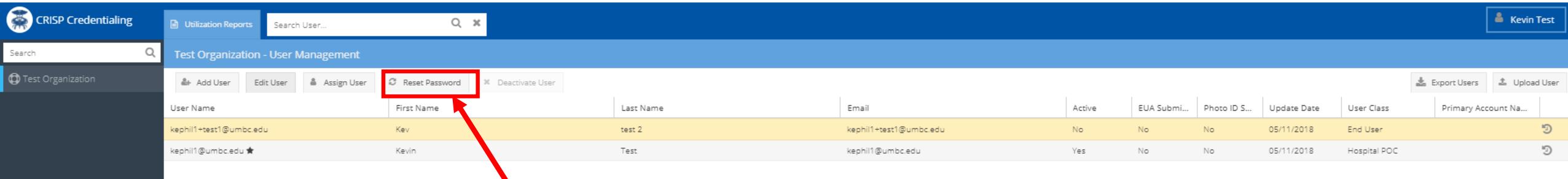
# Password Resets

There are 2 options for password resets:

- User may reset password on CRS Portal login screen at  
<https://reports.crisphealth.org>
- POC may reset password within LogOnce



# Password Resets – via LogOnce



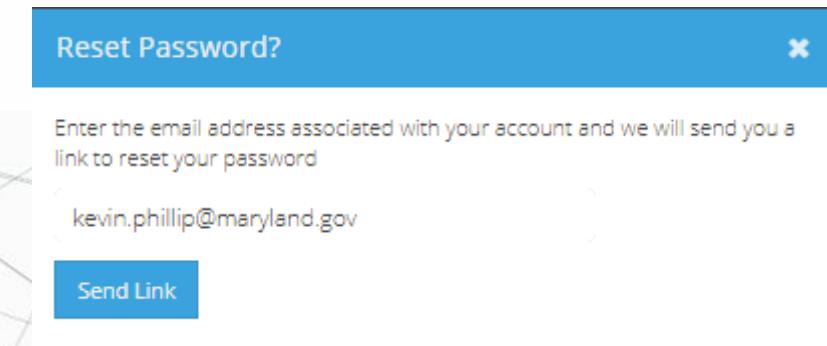
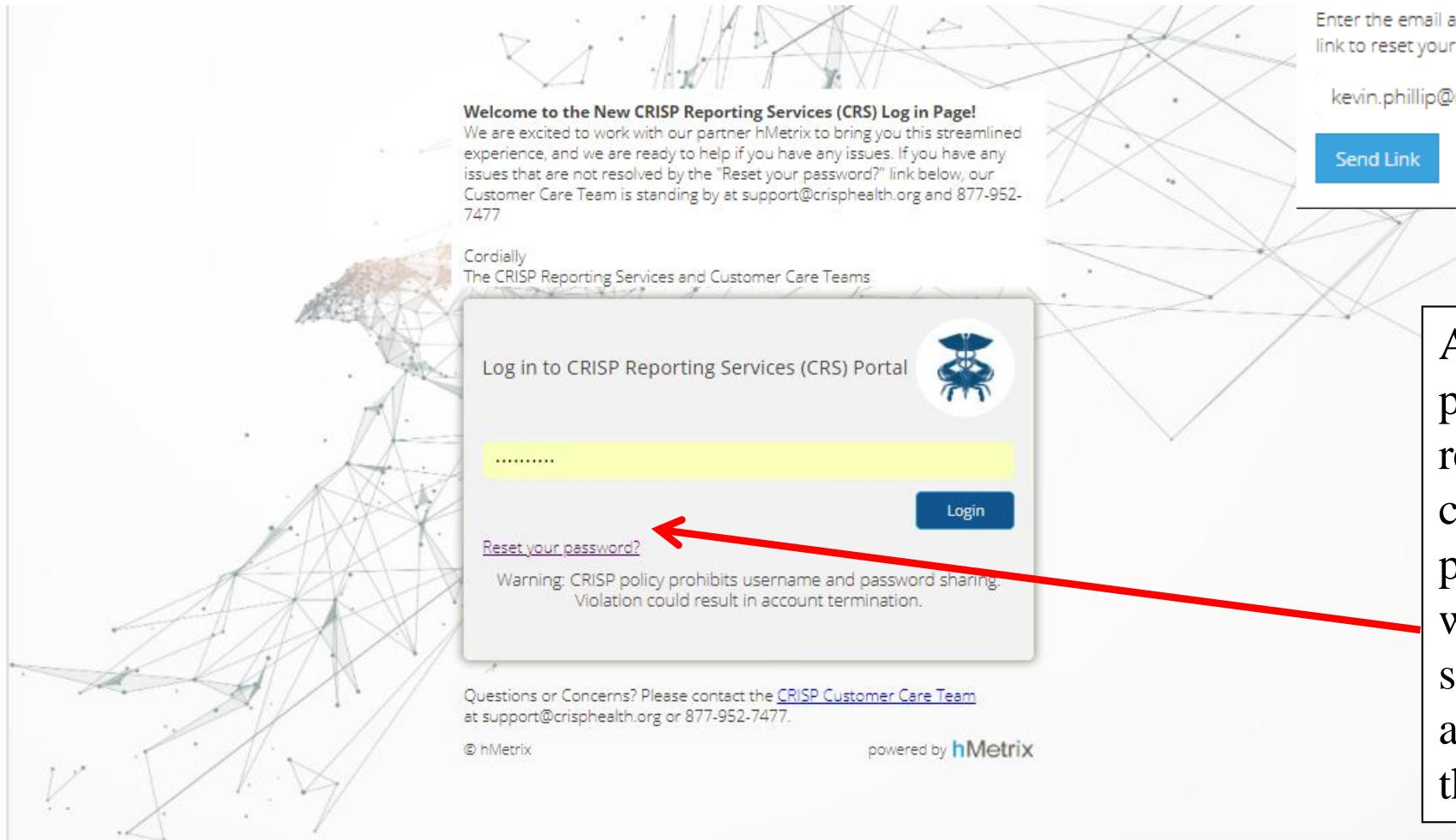
The screenshot shows the 'Test Organization - User Management' page. The top navigation bar includes buttons for 'Utilization Reports', 'Search User...', 'Reset Password' (which is highlighted with a red box and has a red arrow pointing to it from a callout box), and 'Deactivate User'. The main area is a table with columns: User Name, First Name, Last Name, Email, Active, EUA Submi..., Photo ID S..., Update Date, User Class, and Primary Account Na... . Two rows of data are visible: one for 'kephil1+test1@umbc.edu' (First Name: Kev, Last Name: test 2) and another for 'kephil1@umbc.edu' (First Name: Kevin, Last Name: Test). The 'Reset Password' button is located in the top right of the table header.

User Name	First Name	Last Name	Email	Active	EUA Submi...	Photo ID S...	Update Date	User Class	Primary Account Na...
kephil1+test1@umbc.edu	Kev	test 2	kephil1+test1@umbc.edu	No	No	No	05/11/2018	End User	
kephil1@umbc.edu	Kevin	Test	kephil1@umbc.edu	Yes	No	No	05/11/2018	Hospital POC	

To reset a user's password, select the user and click the reset password button. The user will receive an email to reset their password.



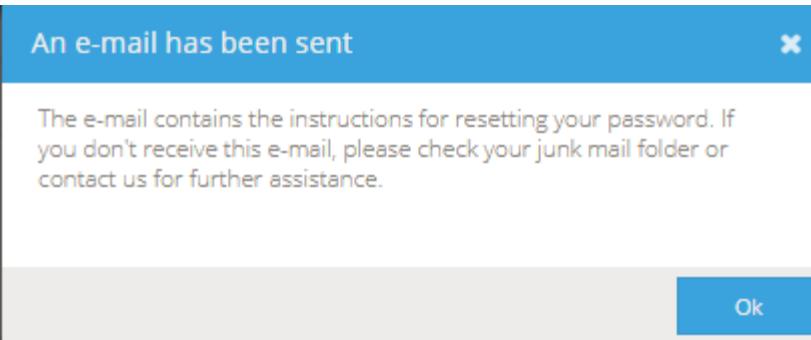
# Password Resets – via <https://reports.crisphealth.org>



A user can reset their password on [reports.crisphealth.org](https://reports.crisphealth.org) by clicking the reset password button. The user will receive a popup to send a link to the email address associated with their account.



# Password Resets – via <https://reports.crisphealth.org>



A user will receive a confirmation that an email has been sent. The email provides a link for the user to reset their password and an URL to that page.

Password Reset Request Inbox x Print Print

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 CRISP LogOnce Support <[donotreply@hmetrix.com](mailto:donotreply@hmetrix.com)>  
to me ▼

10:29 AM (0 minutes ago) Star Forward Print ▼

Dear Kevin Phillip,

To reset your password, please [click here](#). If it is not clickable, please copy and paste the URL given below into your browser's address bar. This link is valid for the next 24 hours.

<http://crisplogoncedemo1.hmetrix.com:80/#account/reset-password/38/378516ccd4be4718abc8178b31c2b16c>

Thank You,  
CRISP Reporting Services

This is a system-generated e-mail. Please do not respond to this e-mail address.



# Locked Out Users

The screenshot shows the 'Test Organization - User Management' page. The user row for 'kephil1@umbc.edu' is highlighted. A red arrow points from the text in the bottom right box to the clock icon in the 'Primary Account Na...' column of the user row.

User Name	First Name	Last Name	Email	Active	EUA Submi...	Photo ID S...	Update Date	User Class	Primary Account Na...
kephil1@umbc.edu	Kevin	Test	kephil1@umbc.edu	Yes	No	No	05/11/2018	Hospital POC	

All User accounts that have had no activity or account logins in 90 consecutive days will be locked out due to inactivity. This counter resets for each user every login.

You can confirm the user is locked out through the User Provisioning Log by clicking the clock symbol on the right side of the user row. Please contact [support@crisphealth.org](mailto:support@crisphealth.org) to have our staff unlock these accounts.



# User Provisioning Log

## User History



Action	Updated By	Updated On
User deactivated from MedStar Good Samaritan Hospital 01/22/2018 09:58 AM	Kevin Phillip	01/22/2018
User activated in MedStar Good Samaritan Hospital on 01/22/2018 09:48 AM	Kevin Phillip	01/22/2018
User deactivated from MedStar Good Samaritan Hospital 01/22/2018 09:47 AM	Kevin Phillip	01/22/2018
User activated in MedStar Good Samaritan Hospital on 01/18/2018 04:06 PM	Kevin Phillip	01/18/2018
User deactivated from MedStar Good Samaritan Hospital 01/18/2018 04:06 PM	Kevin Phillip	01/18/2018
User assigned to MedStar Good Samaritan Hospital on 01/17/2018 11:51 AM	Kevin Phillip	01/17/2018
Password updated on 01/16/2018 12:17 PM	Kevin Phillip	01/16/2018
User assigned to MedStar Harbor Hospital on 01/16/2018 11:38 AM	Kevin Phillip	01/16/2018



# Deactivating a User

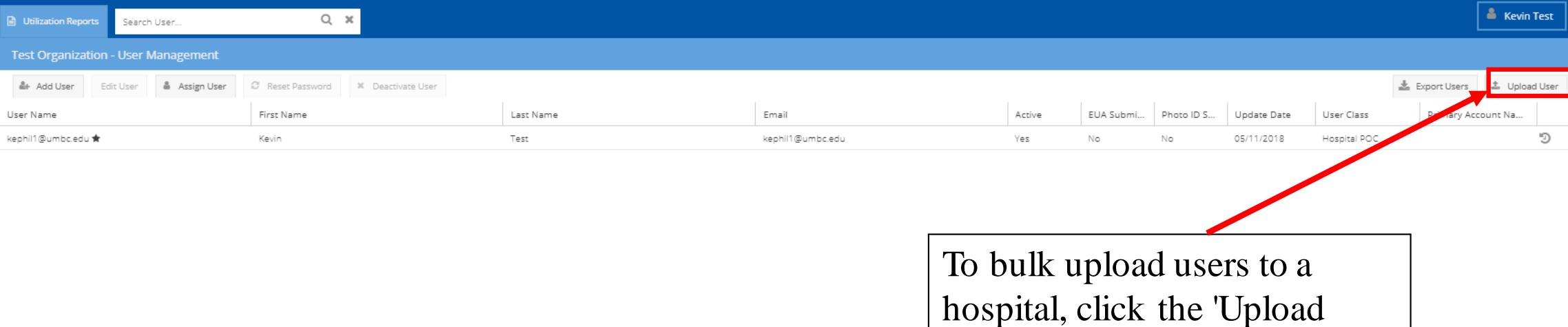
Screenshot of the 'Test Organization - User Management' interface. The 'Deactivate User' button is highlighted with a red box and a red arrow points to it from the text below.

User Name	First Name	Last Name	Email	Active	EUA Submi...	Photo ID S...	Update Date	User Class	Primary Account Na...
kephil1+test1@umbc.edu	Kev	test 2	kephil1+test1@umbc.edu	Yes	Yes	Yes	05/11/2018	End User	
kephil1@umbc.edu ★	Kevin	Test	kephil1@umbc.edu	Yes	No	No	05/11/2018	Hospital POC	

To deactivate a user, select the user and click the 'Deactivate User' button. A 'Confirm' box will popup asking for confirmation of deactivation.



# Bulk Uploading Users



The screenshot shows the 'Test Organization - User Management' page. At the top, there are buttons for 'Add User', 'Edit User', 'Assign User', 'Reset Password', and 'Deactivate User'. Below this is a table with a single user entry:

User Name	First Name	Last Name	Email	Active	EUA Submi...	Photo ID S...	Update Date	User Class	Primary Account Na...
kephil1@umbc.edu	Kevin	Test	kephil1@umbc.edu	Yes	No	No	05/11/2018	Hospital POC	

On the right side of the table, there are 'Export Users' and 'Upload User' buttons, with a red arrow pointing to the 'Upload User' button. Below the table, a modal window titled 'Upload' is displayed, containing a 'Browse...' button, a 'Download Template' button, and 'Cancel' and 'Save' buttons.

To bulk upload users to a hospital, click the 'Upload User' button. Next, download the template and complete required data into the template. Save the file on your local computer (do not change the column headings and file extension). Then, upload your completed template using the 'Browse' button and click 'Save'.



# Recertify Users

Click on the “Recertify Users” tab at the top of the page

Utilization Reports Company User Management Recertify Users Search User... Kevin Philip

Test Organization - User Management

User Name	First Name	Last Name	Email	Active	EUA Submi...	Photo ID S...	Update Date	User Class	Primary Account Na...
kephil1+test1@umbc.edu	Kev	test 2	kephil1+test1@umbc.edu	Yes	Yes	Yes	05/11/2018	End User	
kephil1@umbc.edu ★	Kevin	Test	kephil1@umbc.edu	Yes	No	No	05/11/2018	Hospital POC	

As part of CRISP's Security Process, POCs are required to review their list of active users of CRISP Reporting Services (CRS) every 90 Days and recertify that their users should still have access. This is an opportunity to deactivate users who should no longer have access to reports (e.g. due to termination of employment, etc).



# Recertify Users

## Recertify Users

\*Users need to be recertified every 90 days. If these users are not recertified by 05/22/2018 they will lose access to the CRS Portal.

Recertify Selected

<input type="checkbox"/> User ID	First Name 	Last Name	Organization	User Class
<input type="checkbox"/> kephil1@umbc.edu	Kevin	Test	Test Organization	Hospital POC
<input type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	Care for Your Health Inc	Hospital POC
<input type="checkbox"/> kevin.phillip@crisphealth.org	Kevin	Phillip	Crisp Admin	End User
<input type="checkbox"/> kevin.phillip@crisphealth.org	Kevin	Phillip		Company Administrator
<input type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	HSCRC Organization	Hospital POC
<input type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	University of Maryland Shock Trauma	Hospital POC
<input type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	Cornerstone Montgomery	Hospital POC
<input type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	Crisp Admin	End User

This tab shows you all active users for all Organizations you need to review. Note: if a user is connected to multiple organizations, the user may show up on your list multiple times.



# Recertify Users

## Recertify Users

\*Users need to be recertified every 90 days. If these users are not recertified by 05/22/2018 they will lose access to the CRS Portal.

**Recertify Selected**

<input checked="" type="checkbox"/> User ID	First Name ↑	Last Name	Organization	User Class
<input checked="" type="checkbox"/> kephill1@umbc.edu	Kevin	Test	Test Organization	Hospital POC
<input checked="" type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	Care for Your Health Inc	Hospital POC
<input checked="" type="checkbox"/> kevin.phillip@crisphealth.org	Kevin	Phillip	Crisp Admin	End User
<input checked="" type="checkbox"/> kevin.phillip@crisphealth.org	Kevin	Phillip		Company Administrator
<input checked="" type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	HSCRC Organization	Hospital POC
<input checked="" type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	University of Maryland Shock Trauma	Hospital POC
<input checked="" type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	Cornerstone Montgomery	Hospital POC

Select All, or a subset of your users to recertify (non-recertified users will lose access unless you take further action)



# Recertify Users

## Recertify Users

\*Users need to be recertified every 90 days. If these users are not recertified by 05/22/2018 they will lose access to the CRS Porta

Recertify Selected

<input checked="" type="checkbox"/> User ID	First Name ↑	Last Name	Organization	User Class
<input checked="" type="checkbox"/> kephil1@umbc.edu	Kevin	Test	Test Organization	Hospital POC
<input checked="" type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	Care for Your Health Inc	Hospital POC
<input checked="" type="checkbox"/> kevin.phillip@crisphealth.org	Kevin	Phillip	Crisp Admin	End User
<input checked="" type="checkbox"/> kevin.phillip@crisphealth.org	Kevin	Phillip		Company Administrator
<input checked="" type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	HSCRC Organization	Hospital POC
<input checked="" type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	University of Maryland Shock Trauma	Hospital POC
<input checked="" type="checkbox"/> kevin.phillip@maryland.gov	Kevin	PhilTest	Cornerstone Montgomery	Hospital POC

Click “Recertify Selected” in the upper-right corner



# Changing a User's Email

- POCs and users cannot change their email address in the LogOnce system.
- If a POC or user needs to change an email address in their LogOnce account, the user must be deactivated and a new user with the new email address must be created within the LogOnce system



# CRISP Support Contact

Contact for LogOnce Questions

- [support@crisphealth.org](mailto:support@crisphealth.org)
- 1-877-952-7477

