

HIETexas PULSE COVID

Administrator User Guide

PULSE COVID is a web portal that allows appropriately verified users to find and view electronic patient health and medication histories from across national health information exchange networks.

With a simple search on PULSE COVID, authorized users can view clinical care documents that include medications, allergies, diagnoses, lab results, and other relevant information. This information can be used to augment clinical care, identify patient comorbidities, and fill in gaps related to patient health or demographic data.

This guide will provide step-by-step instructions for Administrators of PULSE COVID.

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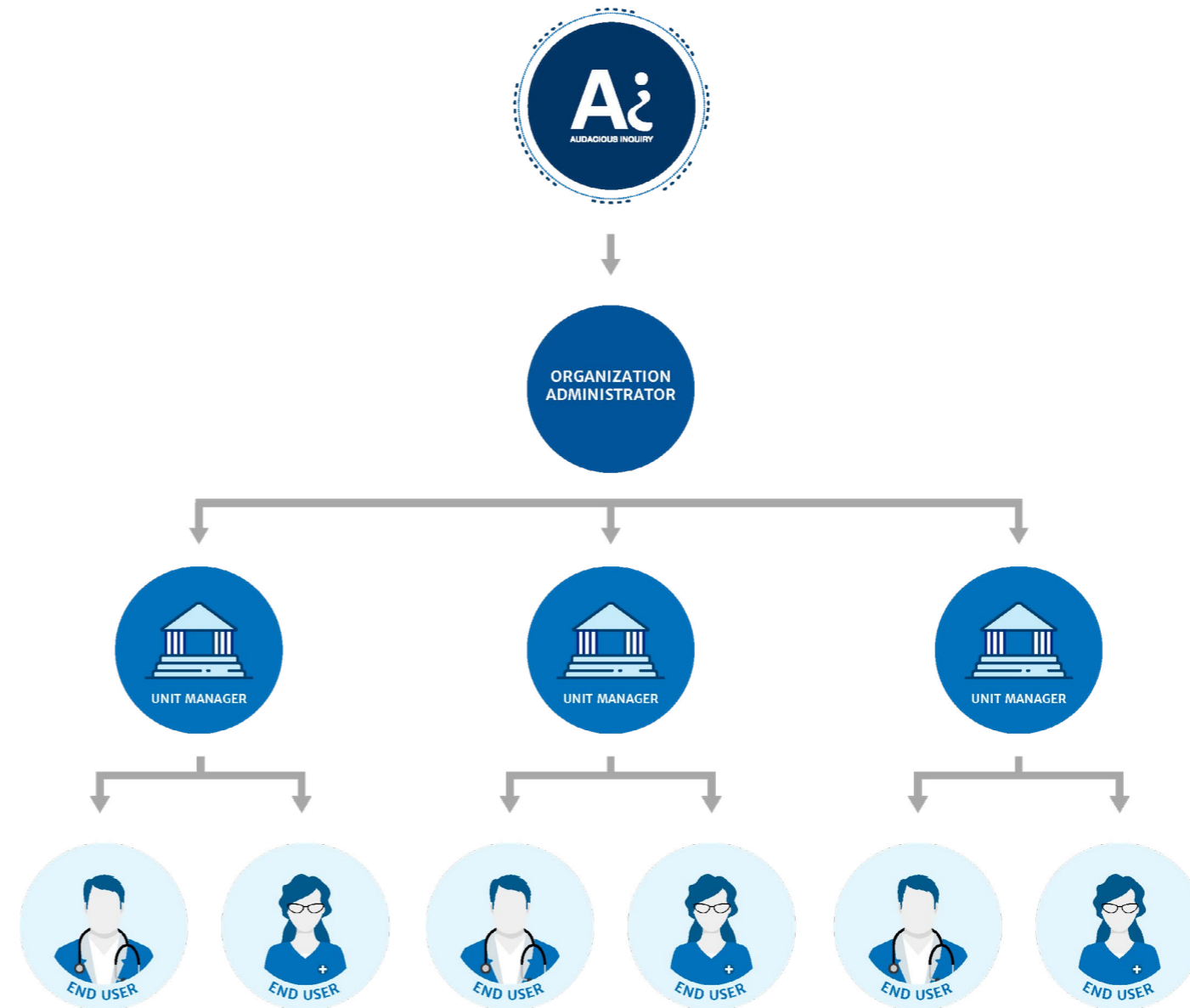
Administrator Types

Each organization can designate two types of Administrator roles.

Organization Administrator

The Organization Administrator is the highest level of Administrator access. We recommend that each organization designate 2-3 organization Administrators. The Organization Administrator can define different “units” within their organization. This could be useful if an Administrator wanted to separate their organization by county or city. The Organization Administrator can view and control access for all Users across their organization. This role can create or deactivate accounts.

Unit Manager: If an Organization Administrator defines “units” for counties or cities, they can designate a User to be the Unit Manager of that sub-organization. A Unit Manager has control of the Users in their sub-organization only. This role can create or deactivate accounts for Users within their designated unit.



Administrators Access

Ai will provision access to Administrators prior to initial Administrator onboarding training by sending an account activation notification by email. Email addresses that are granted access to PULSE COVID must meet the requirements set forth in the PULSE COVID Policies and Procedures.”2. Each Administrator will receive an email notification titled “PULSE COVID” once an account has been created on their behalf.

<https://localhost:8080>: Your New Account



PULSE COVID Notification <donotreply@ainq.com>
To: user@ainq.com

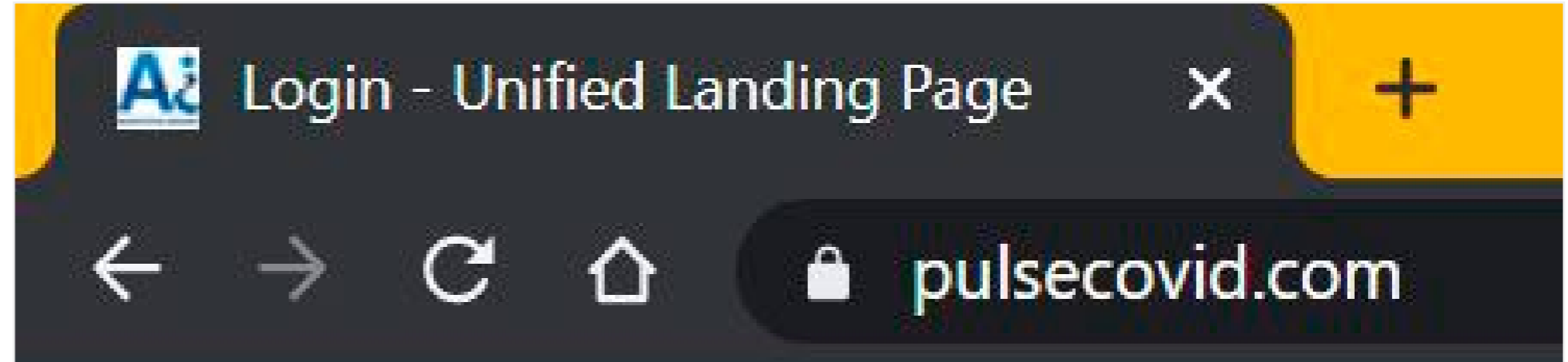
Dear User,

Welcome! An account has been created for you at <https://pulsecovid.com> . Please click on Forgot Password to reset your password.

Sincerely,
PULSE COVID Notification

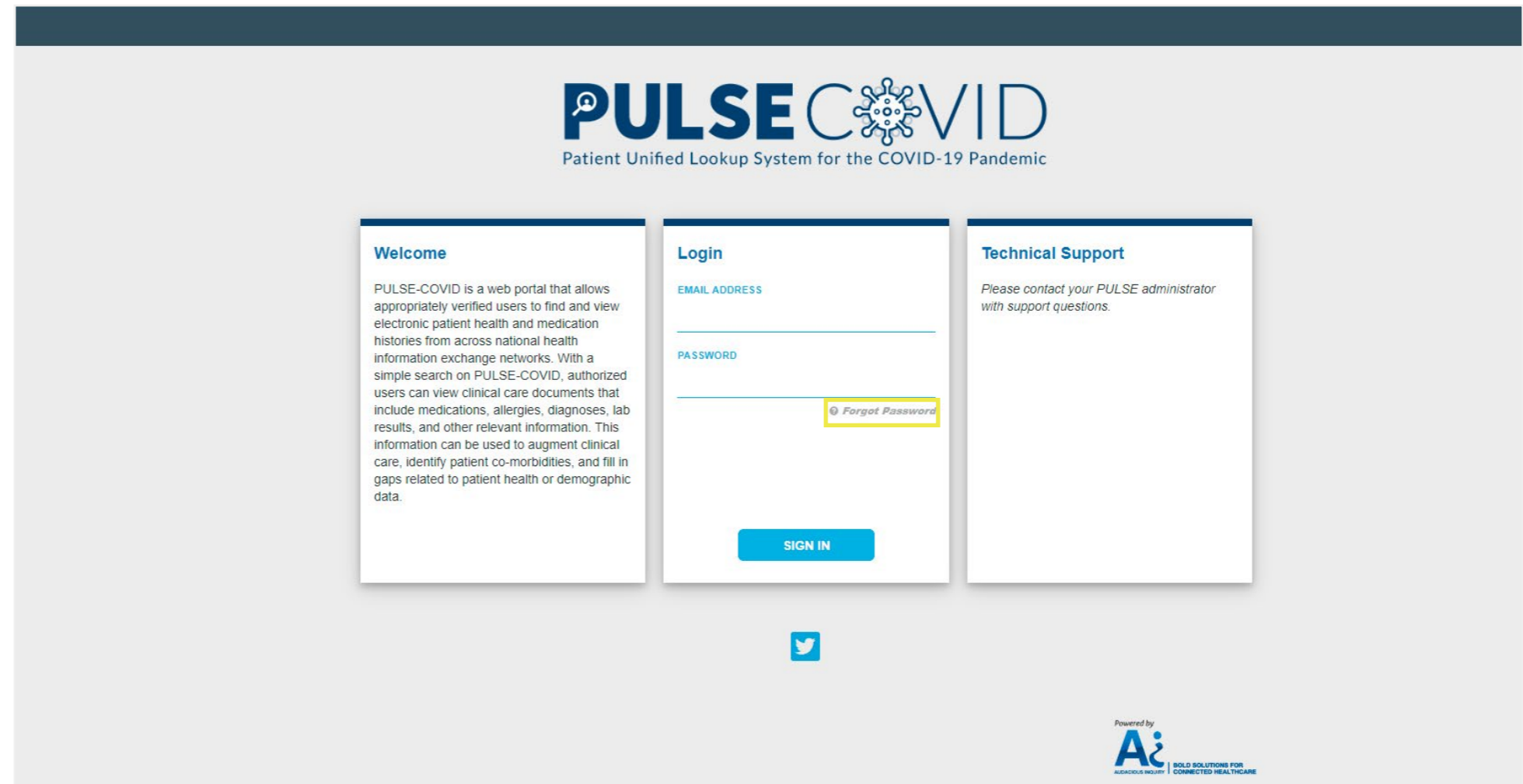
Step 1

Upon receipt of the account activation notification email, select the hyperlink in the email <https://pulsecovid.com> to be navigated to the PULSE-COVID web page to set a password.



Step 2

Select the “Forgot Password” button.



PULSE COVID
Patient Unified Lookup System for the COVID-19 Pandemic

Welcome

PULSE-COVID is a web portal that allows appropriately verified users to find and view electronic patient health and medication histories from across national health information exchange networks. With a simple search on PULSE-COVID, authorized users can view clinical care documents that include medications, allergies, diagnoses, lab results, and other relevant information. This information can be used to augment clinical care, identify patient co-morbidities, and fill in gaps related to patient health or demographic data.

Login

EMAIL ADDRESS

PASSWORD

[Forgot Password](#)

SIGN IN

Technical Support

Please contact your PULSE administrator with support questions.

Powered by **AI** BOLD SOLUTIONS FOR CONNECTED HEALTHCARE

Step 3

Complete the “Email Address” and “Text Verification” fields.
When completed, select the “Next” button



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Forgot Password

EMAIL ADDRESS *

TEXT VERIFICATION *

[Sign In](#)

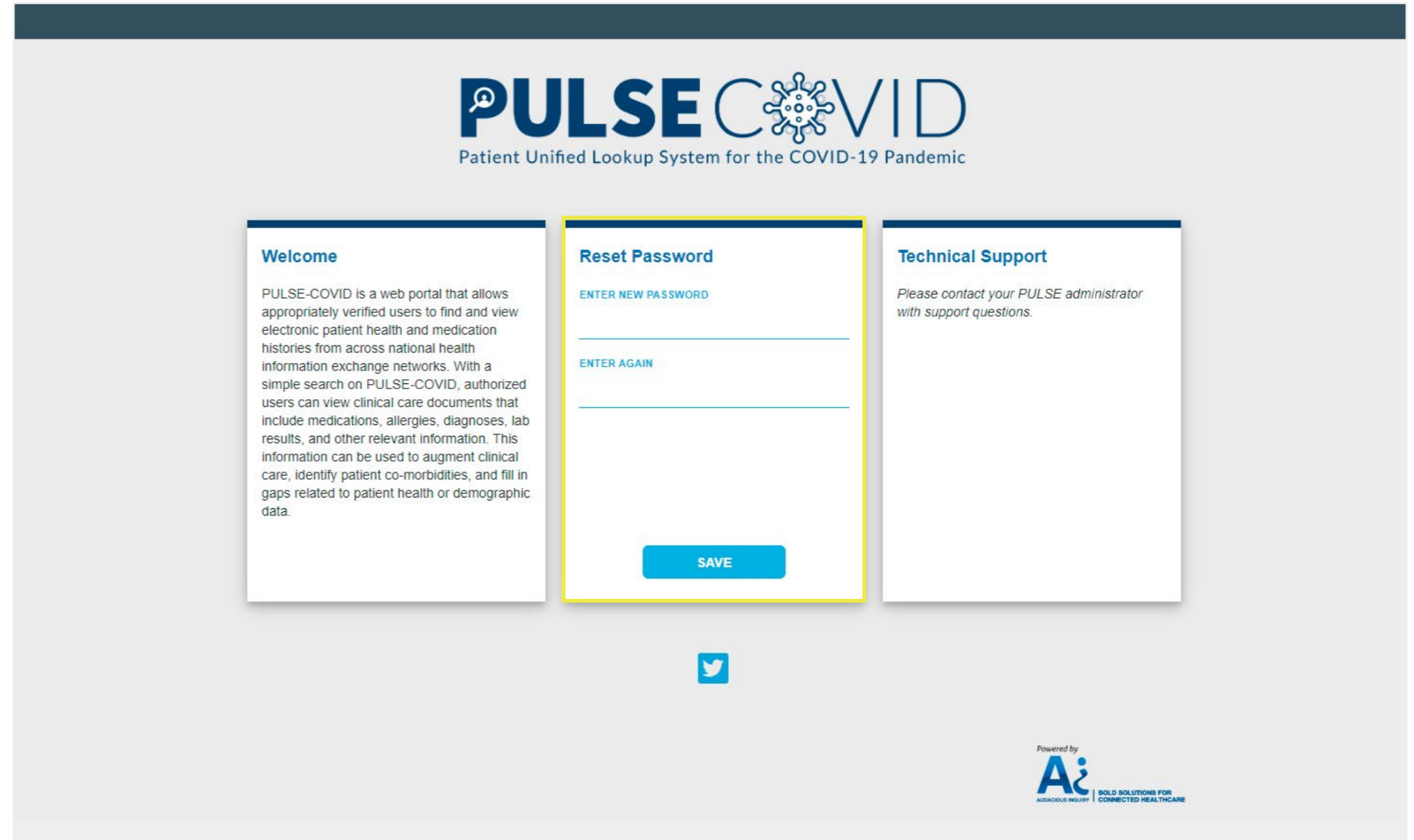
NEXT

Technical Support

Please contact your PULSE administrator with support questions.

Step 4

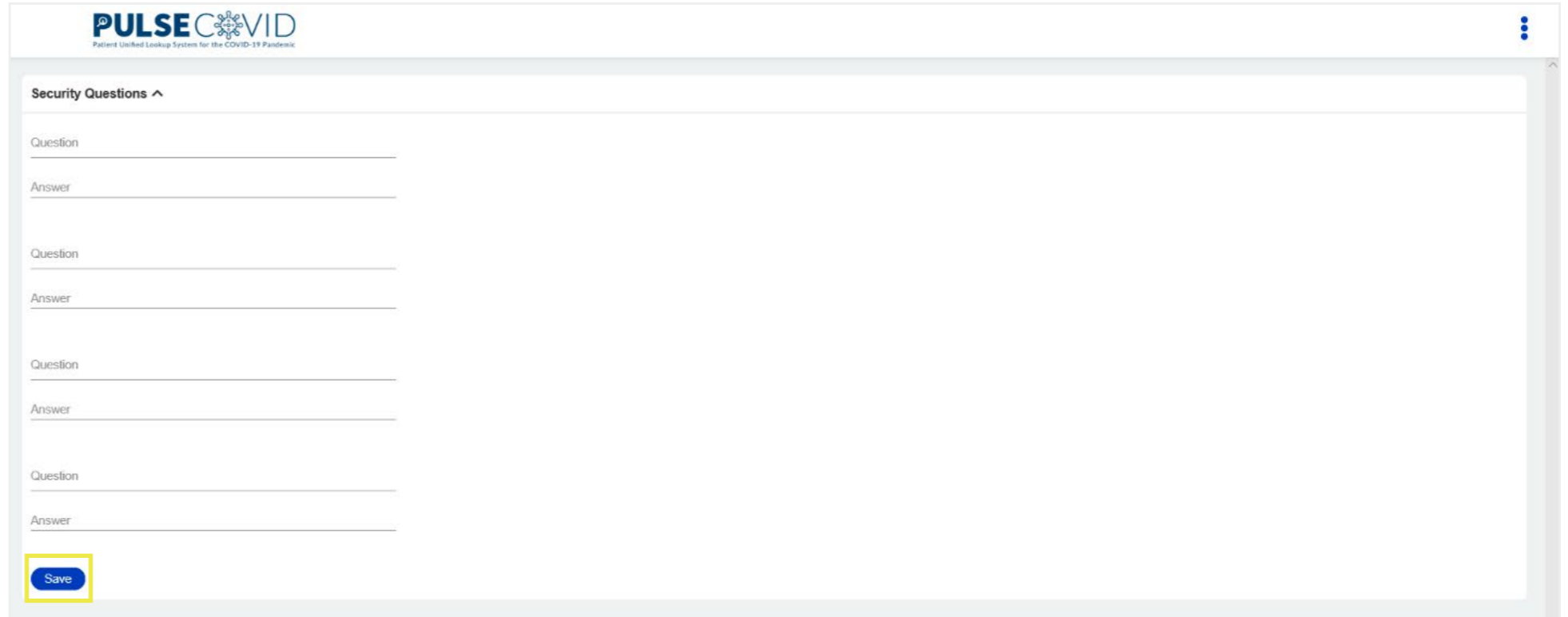
Users will receive an email titled “PULSE COVID”. This email will contain an individualized hyperlink that will navigate to the Password Reset Page. Users should enter a password into the “Enter New Password” and “Enter Again” fields. Once complete, select the “Save” Button”



The screenshot shows the PULSE COVID Password Reset page. At the top, the logo reads "PULSE COVID" with a virus icon, and below it, "Patient Unified Lookup System for the COVID-19 Pandemic". The page is divided into three columns: "Welcome", "Reset Password", and "Technical Support". The "Reset Password" column is highlighted with a yellow border and contains two input fields labeled "ENTER NEW PASSWORD" and "ENTER AGAIN", followed by a blue "SAVE" button. The "Welcome" column contains a paragraph of text about the system's capabilities. The "Technical Support" column contains a note to contact the administrator. At the bottom, there is a Twitter icon and a logo for "Powered by Ai AUDACIOUS INQUIRY | BOLD SOLUTIONS FOR CONNECTED HEALTHCARE".

Step 5

Users will be directed to the Security Question Page. Select four security questions and enter the response into the “Answer” field. Once completed, select the “Save Button”



PULSE COVID
Patient Unified Lookup System for the COVID-19 Pandemic

Security Questions ^

Question _____
Answer _____

Question _____
Answer _____

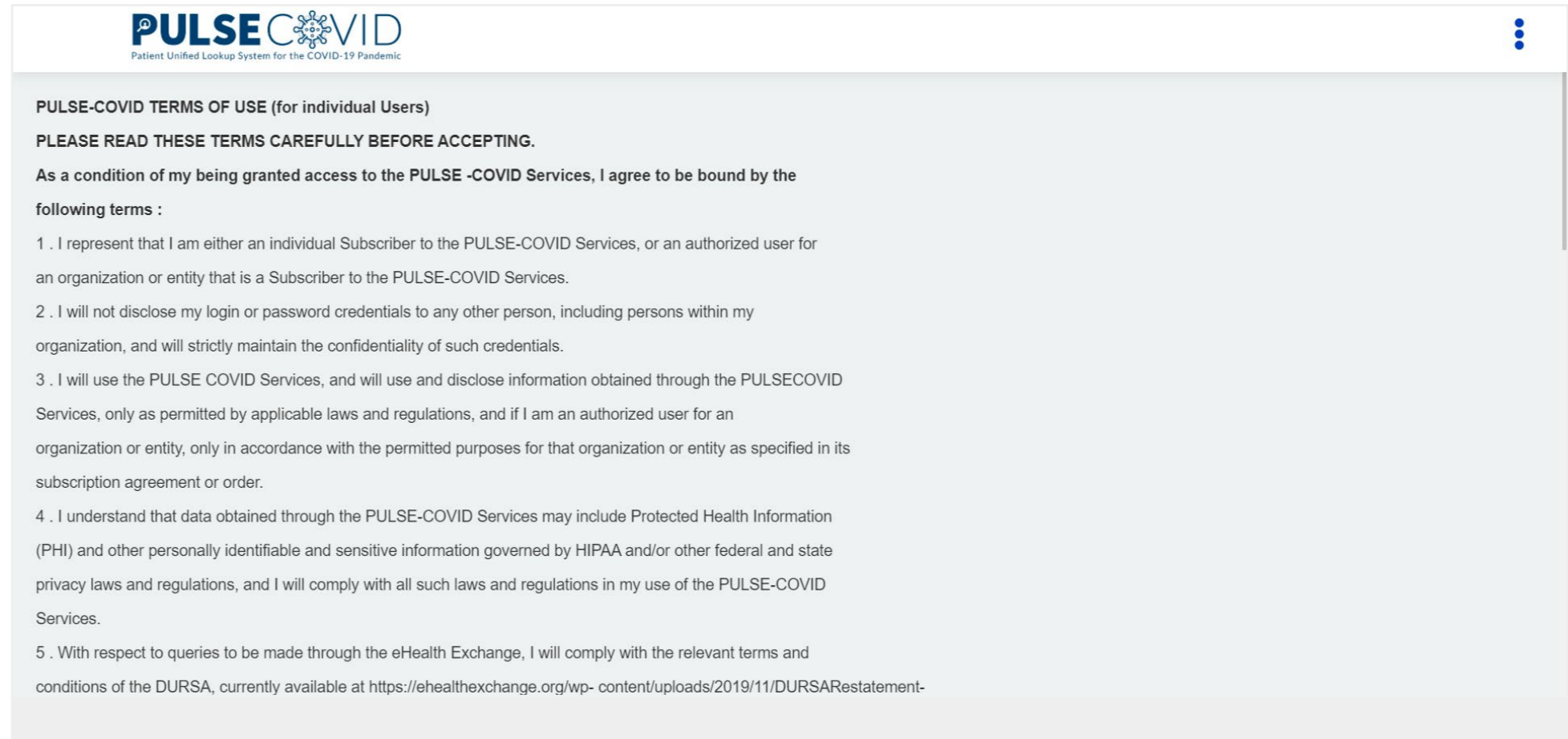
Question _____
Answer _____

Question _____
Answer _____

Save

Step 6

Users will then be directed to the End User Terms of Use. To navigate to the next page, select the “I Agree” button at the bottom of the page.



PULSE COVID
Patient Unified Lookup System for the COVID-19 Pandemic

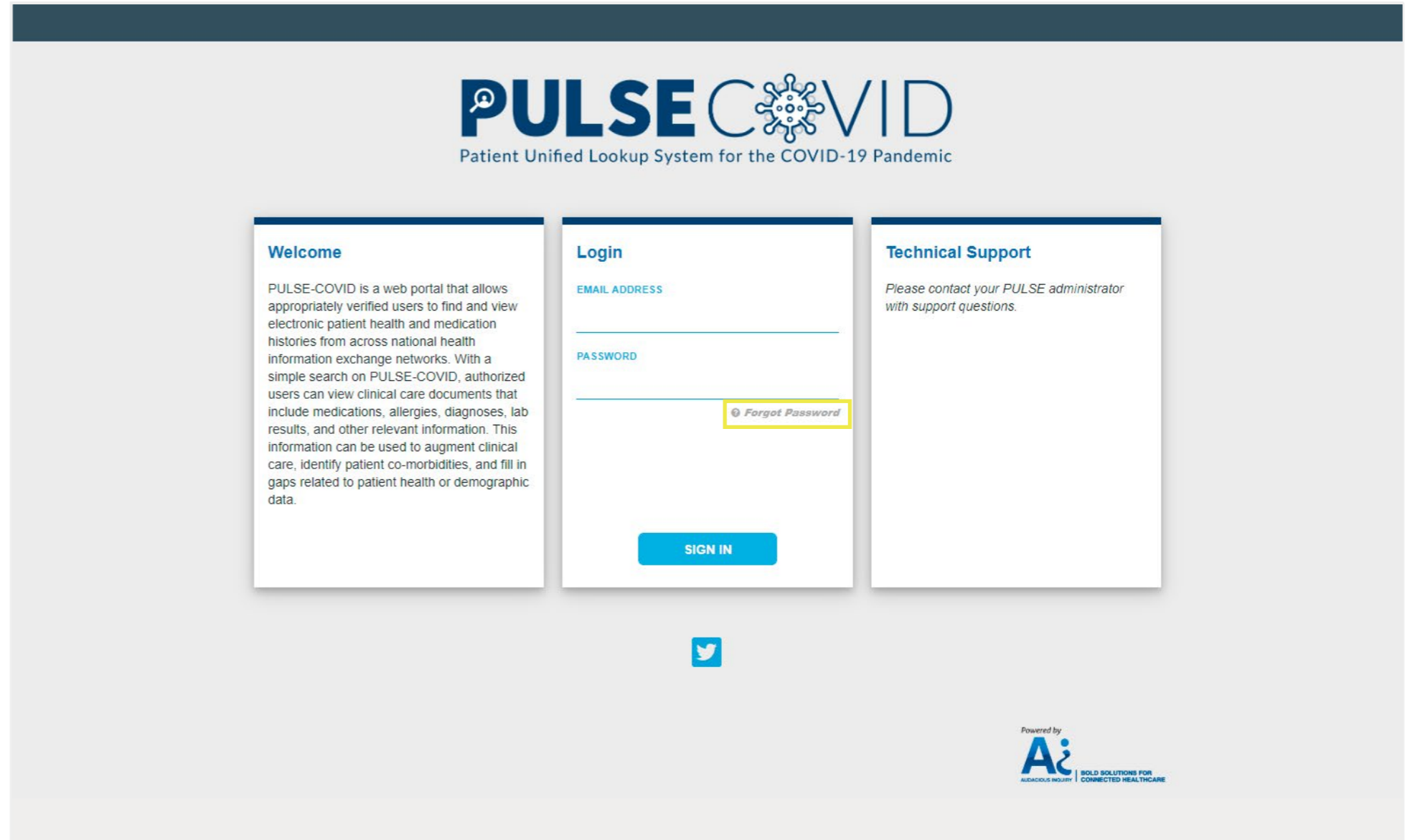
PULSE-COVID TERMS OF USE (for individual Users)
PLEASE READ THESE TERMS CAREFULLY BEFORE ACCEPTING.

As a condition of my being granted access to the PULSE -COVID Services, I agree to be bound by the following terms :

- 1 . I represent that I am either an individual Subscriber to the PULSE-COVID Services, or an authorized user for an organization or entity that is a Subscriber to the PULSE-COVID Services.
- 2 . I will not disclose my login or password credentials to any other person, including persons within my organization, and will strictly maintain the confidentiality of such credentials.
- 3 . I will use the PULSE COVID Services, and will use and disclose information obtained through the PULSECOVID Services, only as permitted by applicable laws and regulations, and if I am an authorized user for an organization or entity, only in accordance with the permitted purposes for that organization or entity as specified in its subscription agreement or order.
- 4 . I understand that data obtained through the PULSE-COVID Services may include Protected Health Information (PHI) and other personally identifiable and sensitive information governed by HIPAA and/or other federal and state privacy laws and regulations, and I will comply with all such laws and regulations in my use of the PULSE-COVID Services.
- 5 . With respect to queries to be made through the eHealth Exchange, I will comply with the relevant terms and conditions of the DURSA, currently available at <https://ehealthexchange.org/wp-content/uploads/2019/11/DURSARestatement->

Step 1

To reset a password, navigate to <https://www.pulsecovid.com>
Select the “Forgot Password” button on the login screen.



PULSE COVID
Patient Unified Lookup System for the COVID-19 Pandemic

Welcome

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Login

EMAIL ADDRESS

PASSWORD

[Forgot Password](#)

SIGN IN

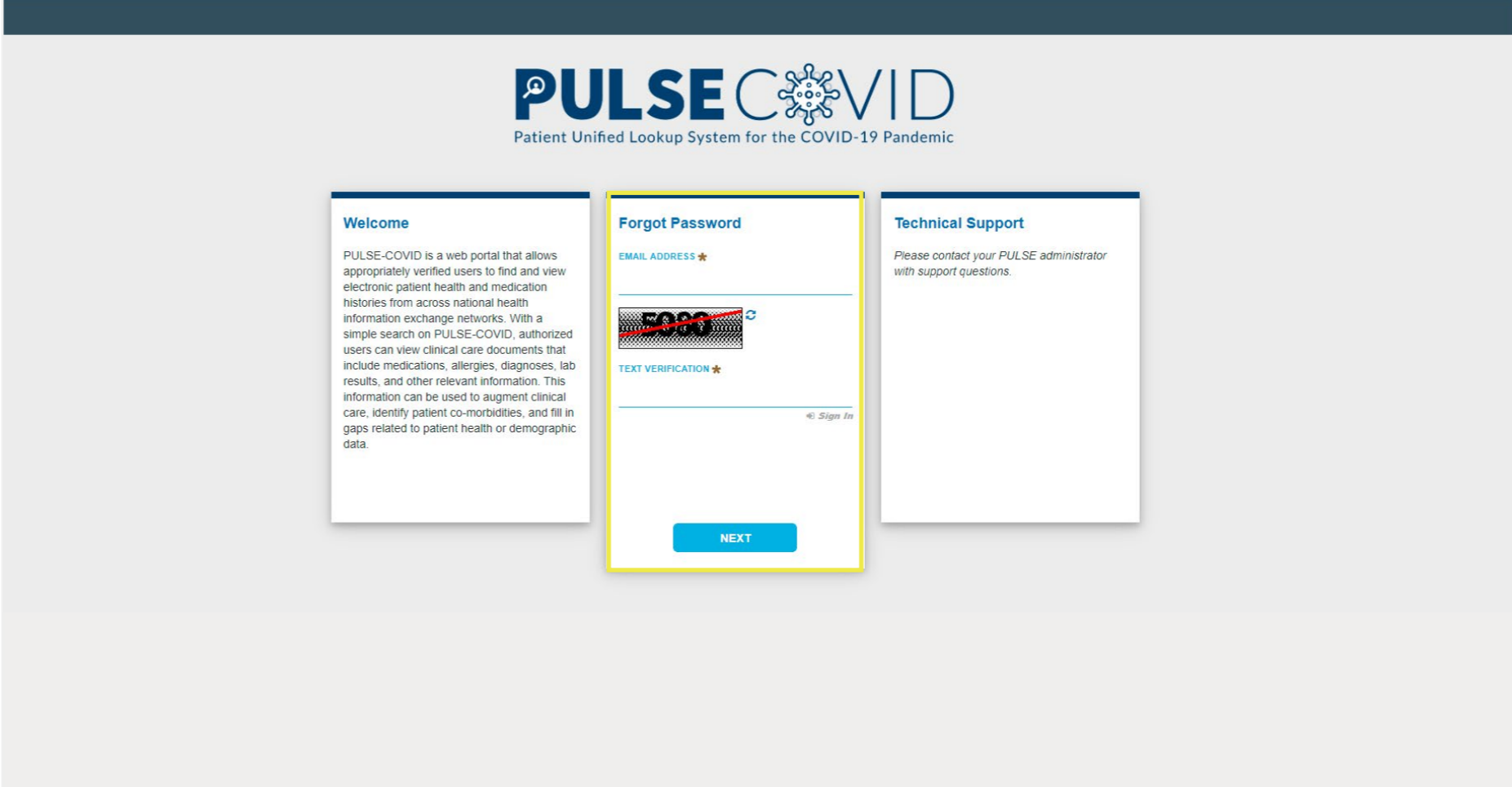
Technical Support

Please contact your PULSE administrator with support questions.

Powered by **A&I** BOLD SOLUTIONS FOR CONNECTED HEALTHCARE

Step 2

Users should complete the “Email Address” and “Text Verification” fields. When completed, select the “Next Button”



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Patient Unified Lookup System for the COVID-19 Pandemic

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Forgot Password

EMAIL ADDRESS *

TEXT VERIFICATION *

[Sign In](#)

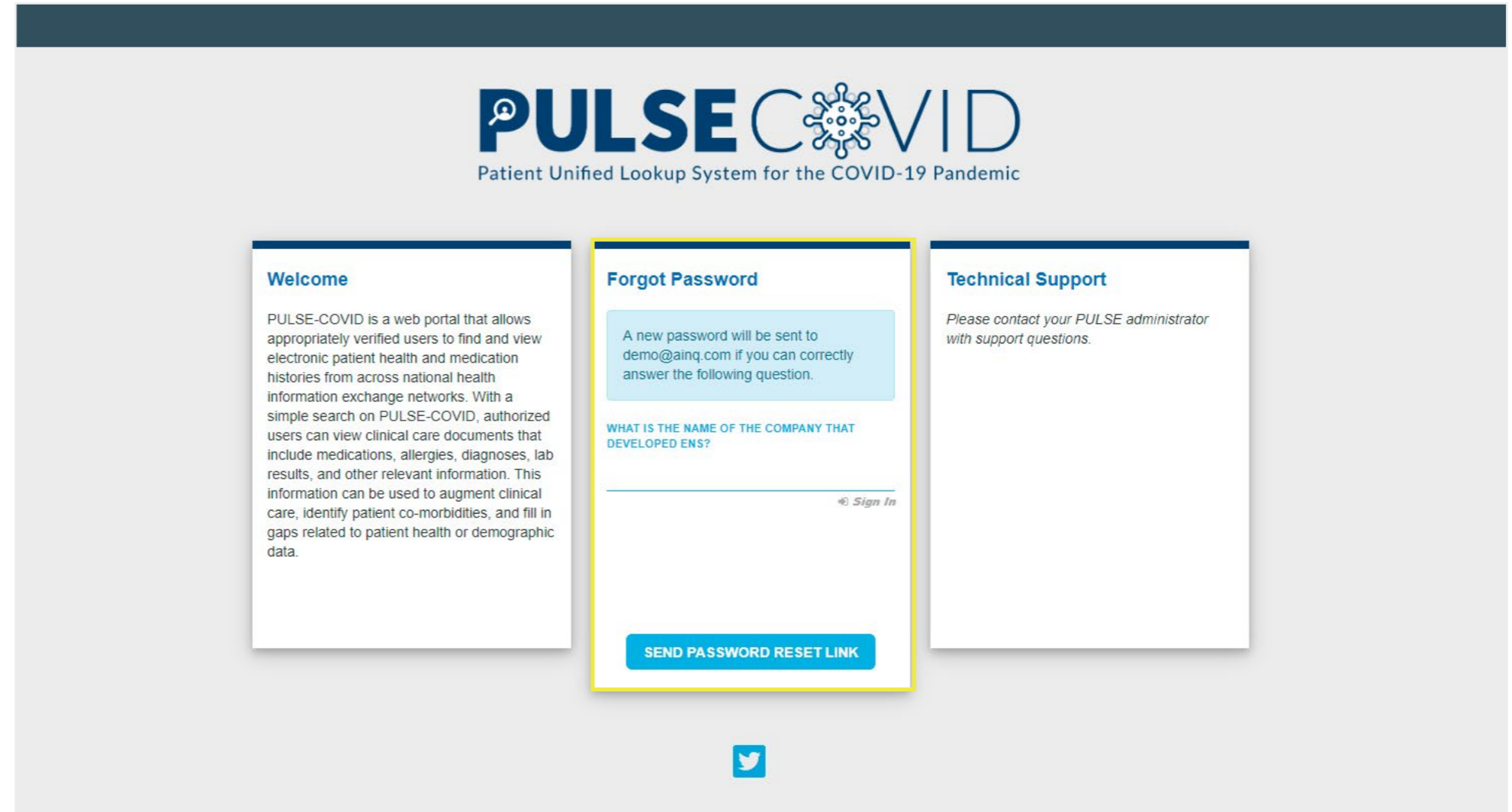
NEXT

Technical Support

Please contact your PULSE administrator with support questions.

Step 3

Users will be prompted to enter the correct answer to the security question displayed. Once completed, select the “Send Password Reset Link”. If the answer is correct, an email will be sent to the user with an individualized hyperlink to reset their password. Users can reset their password and then login to the system.



Provision Credentials

Administrators will be responsible for designating authorized Users' access to PULSE COVID. An Administrator can provision PULSE COVID account credentials through two methods.

Option One: Ai-Led User Account Provisioning

Ai will provide each Administrator with a User upload template (example to the right) for which they are responsible for entering the information for every authorized User.

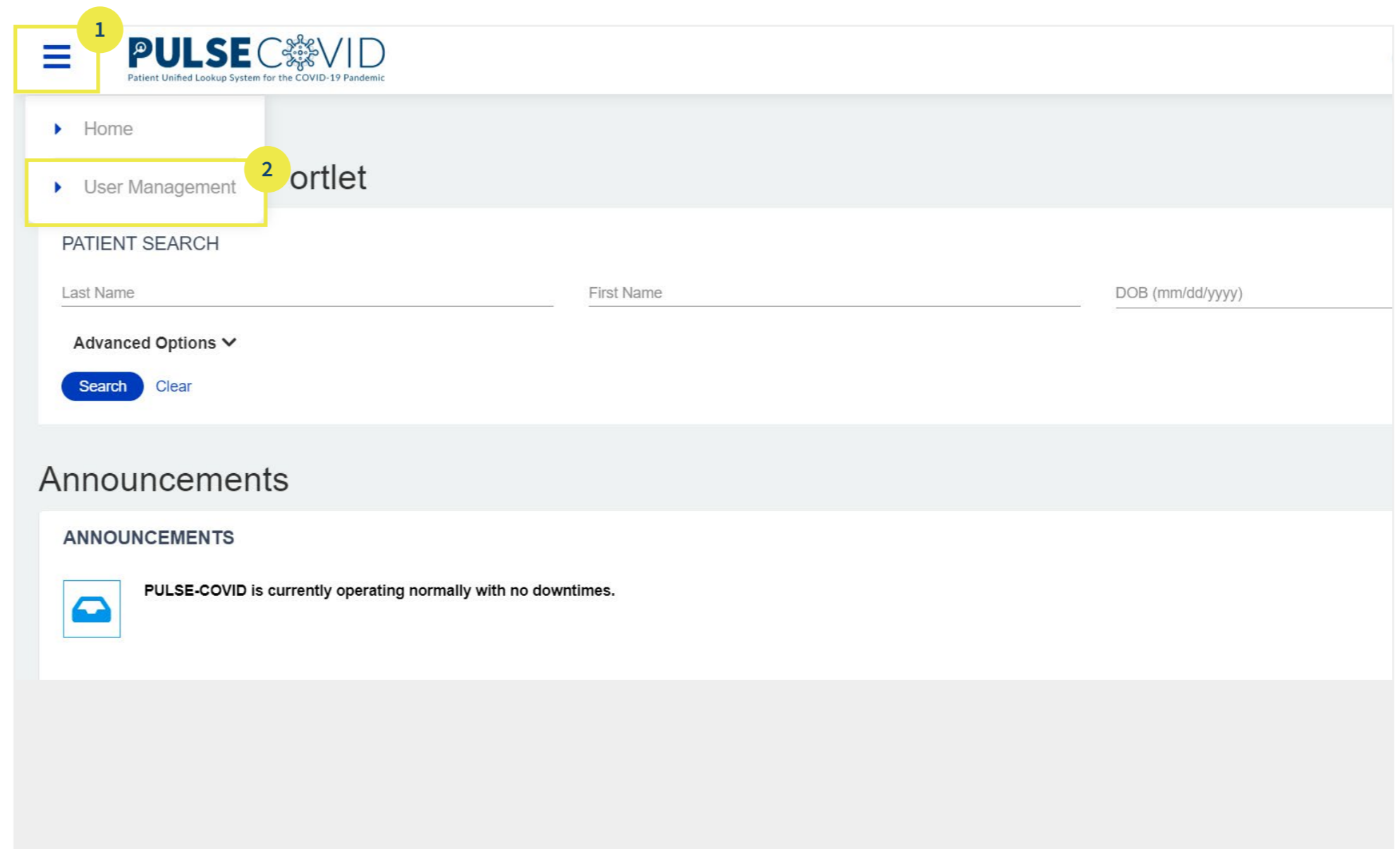
	A	B	C	D
1	Last Name	First Name	Email	Organization
2	user4	shankar	shankar4@ainq.com	Audacious Inquiry
3				
4				

Provision Credentials

Option Two: Administrator-Led User Account Provisioning

Administrators can use the PULSE COVID User Management portal to create User accounts. The Administrator can create individual User accounts or provision multiple accounts at once using the bulk upload function.

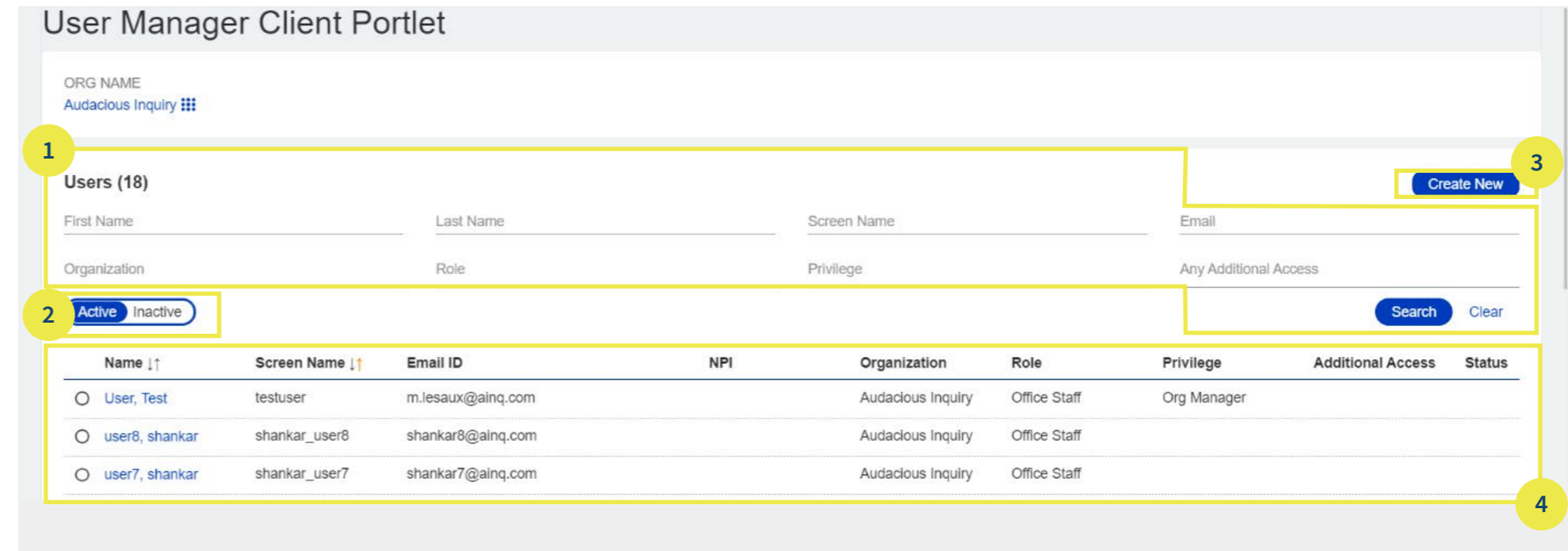
1. Log in to PULSE COVID and navigate to the upper left-hand corner of the screen. Select the Menu button.
2. From the drop-down provided, select the “User Management” button. Clicking the User Management button will bring you to the User Management Portal.



The screenshot shows the PULSE COVID User Management Portal. At the top left, there is a menu icon (three horizontal lines) with a yellow circle containing the number '1' next to it. Below the menu icon, a dropdown menu is open, showing 'Home' and 'User Management' (with a yellow circle containing the number '2' next to it). The main content area is titled 'PULSE COVID' with the subtitle 'Patient Unified Lookup System for the COVID-19 Pandemic'. Below this, there is a 'PATIENT SEARCH' section with input fields for 'Last Name', 'First Name', and 'DOB (mm/dd/yyyy)'. There is also an 'Advanced Options' dropdown and 'Search' and 'Clear' buttons. Below the search section, there is an 'Announcements' section with a heading 'ANNOUNCEMENTS' and a message: 'PULSE-COVID is currently operating normally with no downtimes.' accompanied by a blue envelope icon.

Navigating the User Manager Portal

1. In the User Search field, enter a User’s information where prompted, and click “Search” to locate their account. To clear your search results, click the “Clear” button.
2. The Active/Inactive button allows you to change how you view your results – clicking the “Active” button will display information on active users only, while clicking the “Inactive” button will display Users who have been deactivated.
3. To create a new User, select the “Create New” button to the right of the screen.
4. To see a list of all Users in your system, view the List of Users, directly below the User Search field. This will show all Users, both active and inactive.



User Manager Client Portlet

ORG NAME
Audacious Inquiry

1 Users (18) **3** Create New

First Name Last Name Screen Name Email
Organization Role Privilege Any Additional Access

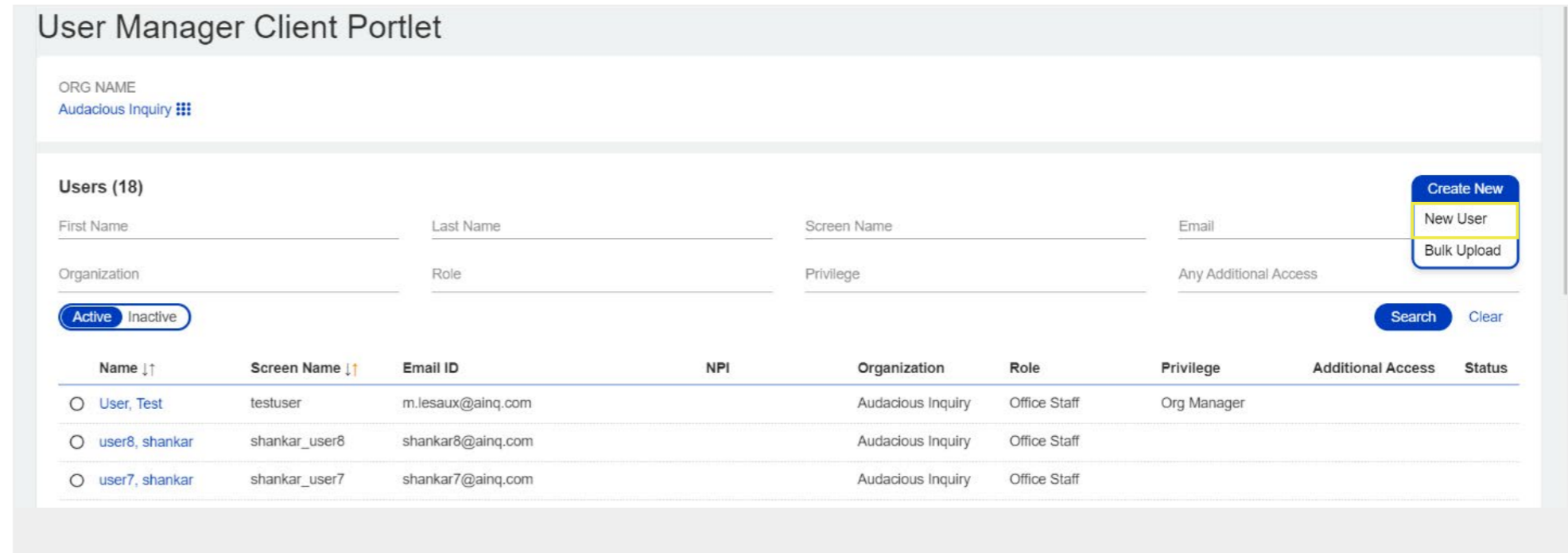
2 Active Inactive Search Clear

Name ↑↓	Screen Name ↑↓	Email ID	NPI	Organization	Role	Privilege	Additional Access	Status
<input type="radio"/> User, Test	testuser	m.lesaux@ainq.com		Audacious Inquiry	Office Staff	Org Manager		
<input type="radio"/> user8, shankar	shankar_user8	shankar8@ainq.com		Audacious Inquiry	Office Staff			
<input type="radio"/> user7, shankar	shankar_user7	shankar7@ainq.com		Audacious Inquiry	Office Staff			

4

Create a New Single User Account

1. To create a new single user account, select the “Create New” button on the right-hand side of the screen. From the drop-down list, select the “New User” button.



User Manager Client Portlet

ORG NAME
Audacious Inquiry

Users (18)

First Name: _____ Last Name: _____ Screen Name: _____ Email: _____

Organization: _____ Role: _____ Privilege: _____ Any Additional Access: _____

Create New
New User
Bulk Upload

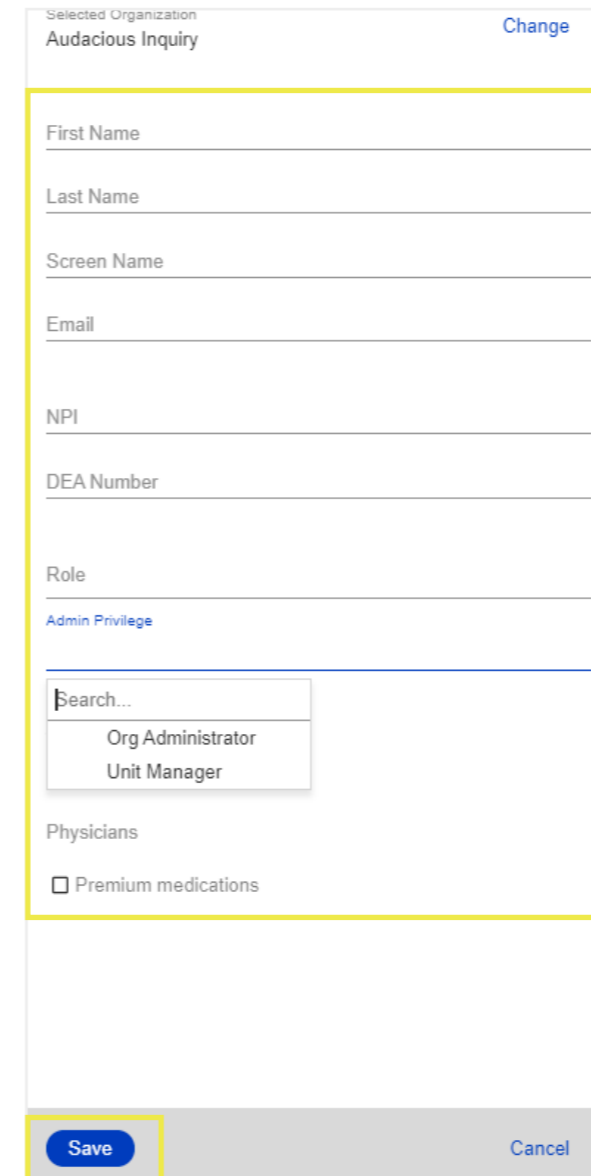
Active Inactive **Search** Clear

Name ↓↑	Screen Name ↓↑	Email ID	NPI	Organization	Role	Privilege	Additional Access	Status
<input type="radio"/> User, Test	testuser	m.lesaux@ainq.com		Audacious Inquiry	Office Staff	Org Manager		
<input type="radio"/> user8, shankar	shankar_user8	shankar8@ainq.com		Audacious Inquiry	Office Staff			
<input type="radio"/> user7, shankar	shankar_user7	shankar7@ainq.com		Audacious Inquiry	Office Staff			

Create a New Single User Account

- A pop-up box will appear on the right-hand side of the screen. The Administrator must enter in the User's First Name, Last Name, and Email Address. The Administrator may enter in a User's NPI or DEA number, however these are not required fields. In the "Role" field, select "Office Staff".

In the "Admin Privilege" field, select whether the User should be granted Administrator or Unit Manager roles. If the User does not need these privileges, leave this field blank. Once completed select the "Save" button to create the account.

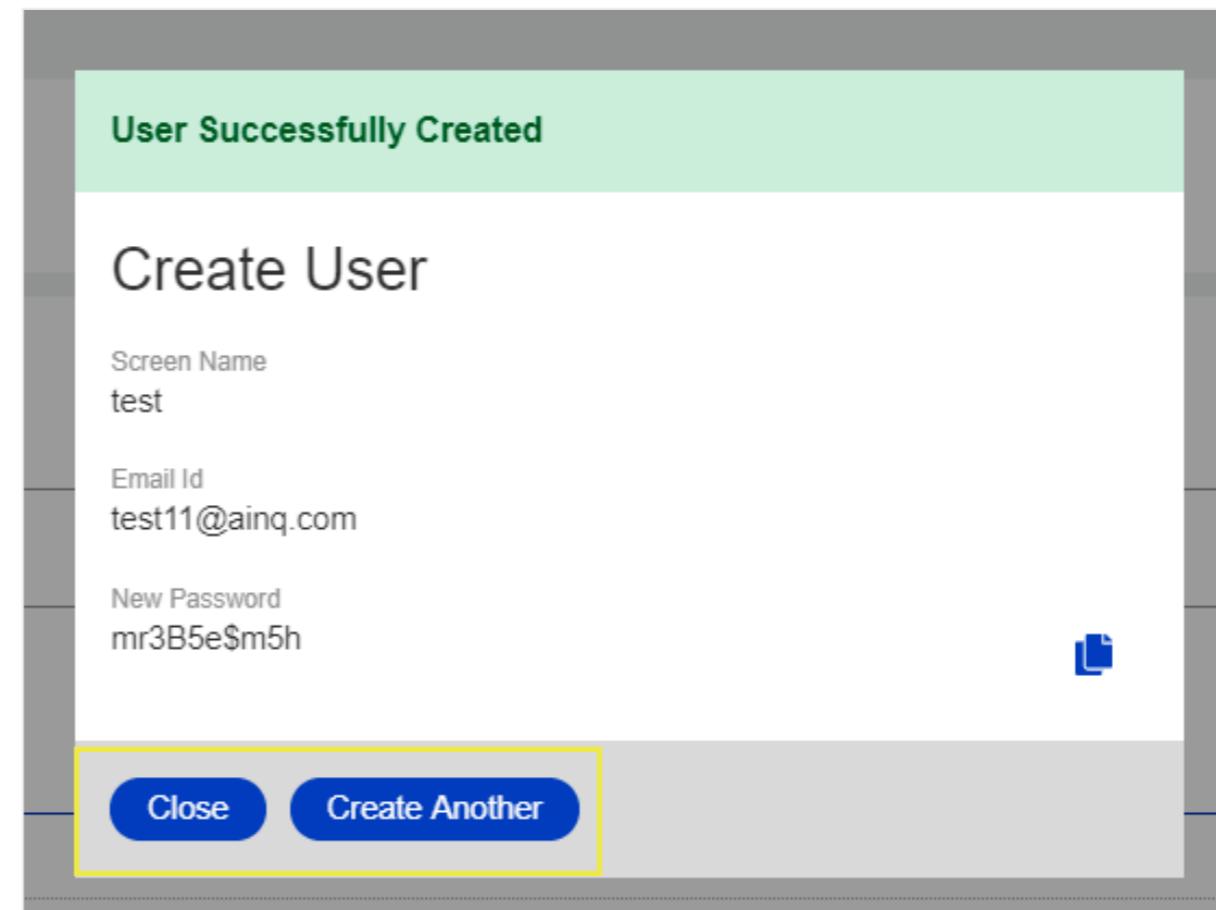


The screenshot shows a user creation form with the following fields and options:

- Selected Organization:** Audacious Inquiry (with a [Change](#) link)
- First Name:** Text input field
- Last Name:** Text input field
- Screen Name:** Text input field
- Email:** Text input field
- NPI:** Text input field
- DEA Number:** Text input field
- Role:** Text input field
- Admin Privilege:** A dropdown menu with a search bar and two options: **Org Administrator** and **Unit Manager**.
- Physicians:** A section with a checkbox for **Premium medications**.
- Buttons:** **Save** (highlighted with a yellow border) and **Cancel**.

Create a New Single User Account

3. After the account has been created successfully, a window will appear which shows the User's credentials and temporary password. The User will be emailed information on how to login and set their password. The temporary password is not needed for an end user. When finished, select "Close" or "Create Another".



Bulk Upload Users

If an Administrator would like to provision user accounts to multiple individuals at the same time, you can do that through the bulk upload function.

Ai will send a bulk upload template. Complete fields for all Users as defined in the below picture. The cells in blue are guidance for data entry, they should not be included in the bulk upload template. Once completed, save the file as a .csv file. PULSE COVID was developed quickly using existing technologies, therefore some of these fields are not necessary for use in PULSE COVID and are included as artifacts of the platform’s original use.

Screen Name - Enter in the first part of the user’s email address

Last Name - Enter in the user’s last name

First Name - Enter in the user’s first name

Provider NPI - Optional Field

Email - Enter in the user’s email

Org Administrator - Always enter N

Unit Manager - Enter N if access is not needed, Enter Y if Unit Manager access is needed

ED Provider - Leave Blank

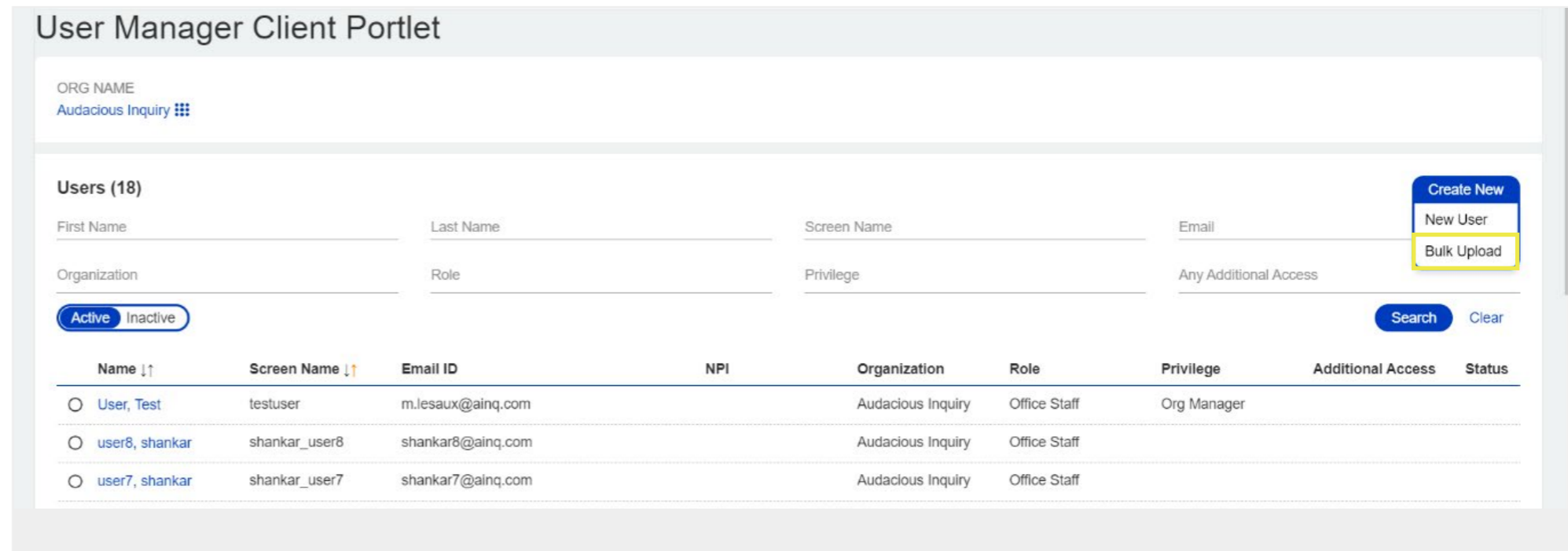
Clinician - Leave Blank

Office Staff - Always enter Y

	A	B	C	D	E	F	G	H	I	J	K	L
1	Screen Name	Last Name	First Name	Provider NPI	Email	Org Administrator	Unit Manager	ED Provider User	Clinician	Office Staff		
2	demo_user4	user4	demo		demo@ainq.com	N	N			Y		
3	demo_user5	user5	demo		demo15@ainq.com	N	N			Y		
4	Enter in first part of email address			Optional		Always enter N	Enter N if access is not needed; Enter Y if access if needed	Leave Blank	Leave Blank	Always enter Y		
5												
6												
7												
8												

Bulk Upload Users

2. In PULSE COVID, navigate to the User management portal. Select the “Create New” button, from the drop-down list, then select the “Bulk Upload” button.



User Manager Client Portlet

ORG NAME
Audacious Inquiry

Users (18)

First Name: _____ Last Name: _____ Screen Name: _____ Email: _____
Organization: _____ Role: _____ Privilege: _____ Any Additional Access: _____

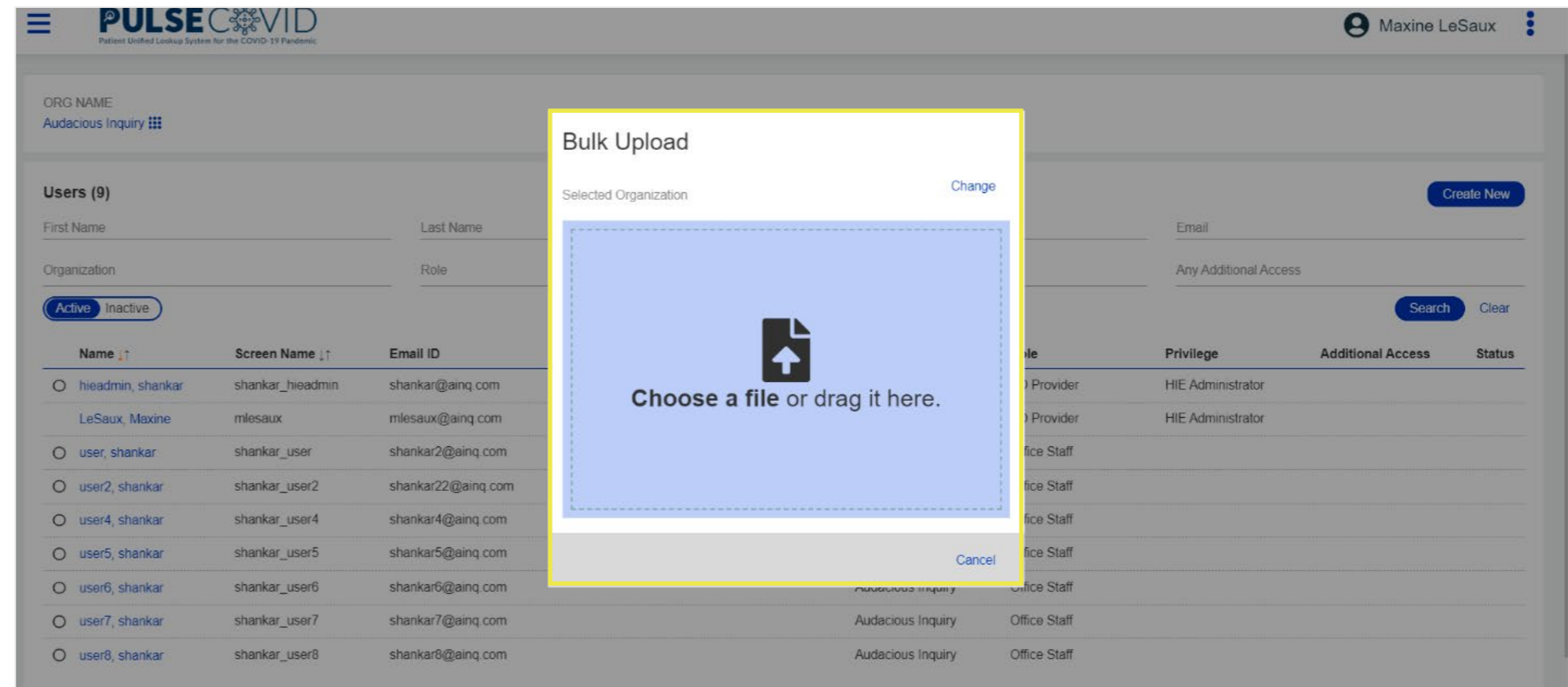
Create New
New User
Bulk Upload

Active **Inactive** **Search** **Clear**

Name ↓↑	Screen Name ↓↑	Email ID	NPI	Organization	Role	Privilege	Additional Access	Status
<input type="radio"/> User, Test	testuser	m.lesaux@ainq.com		Audacious Inquiry	Office Staff	Org Manager		
<input type="radio"/> user8, shankar	shankar_user8	shankar8@ainq.com		Audacious Inquiry	Office Staff			
<input type="radio"/> user7, shankar	shankar_user7	shankar7@ainq.com		Audacious Inquiry	Office Staff			

Bulk Upload Users

3. A window will appear to conduct the bulk upload. Input the .csv bulk upload spreadsheet with User information into the box

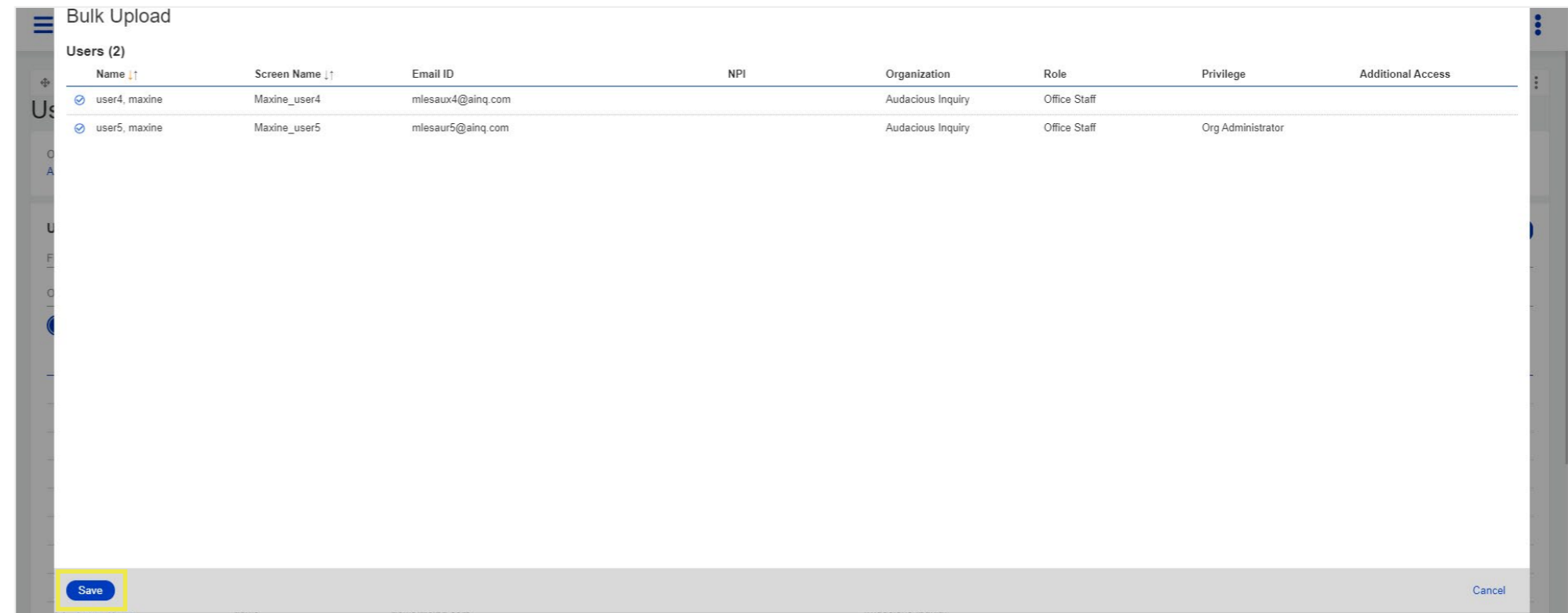


The screenshot shows the PULSE COVID user management interface. A modal window titled "Bulk Upload" is open, prompting the user to "Choose a file or drag it here." The background interface includes a header with the PULSE COVID logo and the user's name, Maxine LeSaux. Below the header, there is a section for "Users (9)" with a table listing user details. The table has columns for Name, Screen Name, and Email ID. The users listed are:

Name	Screen Name	Email ID
hiedmin, shankar	shankar_hiedmin	shankar@ainq.com
LeSaux, Maxine	mlesaux	mlesaux@ainq.com
user, shankar	shankar_user	shankar2@ainq.com
user2, shankar	shankar_user2	shankar22@ainq.com
user4, shankar	shankar_user4	shankar4@ainq.com
user5, shankar	shankar_user5	shankar5@ainq.com
user6, shankar	shankar_user6	shankar6@ainq.com
user7, shankar	shankar_user7	shankar7@ainq.com
user8, shankar	shankar_user8	shankar8@ainq.com

Bulk Upload Users

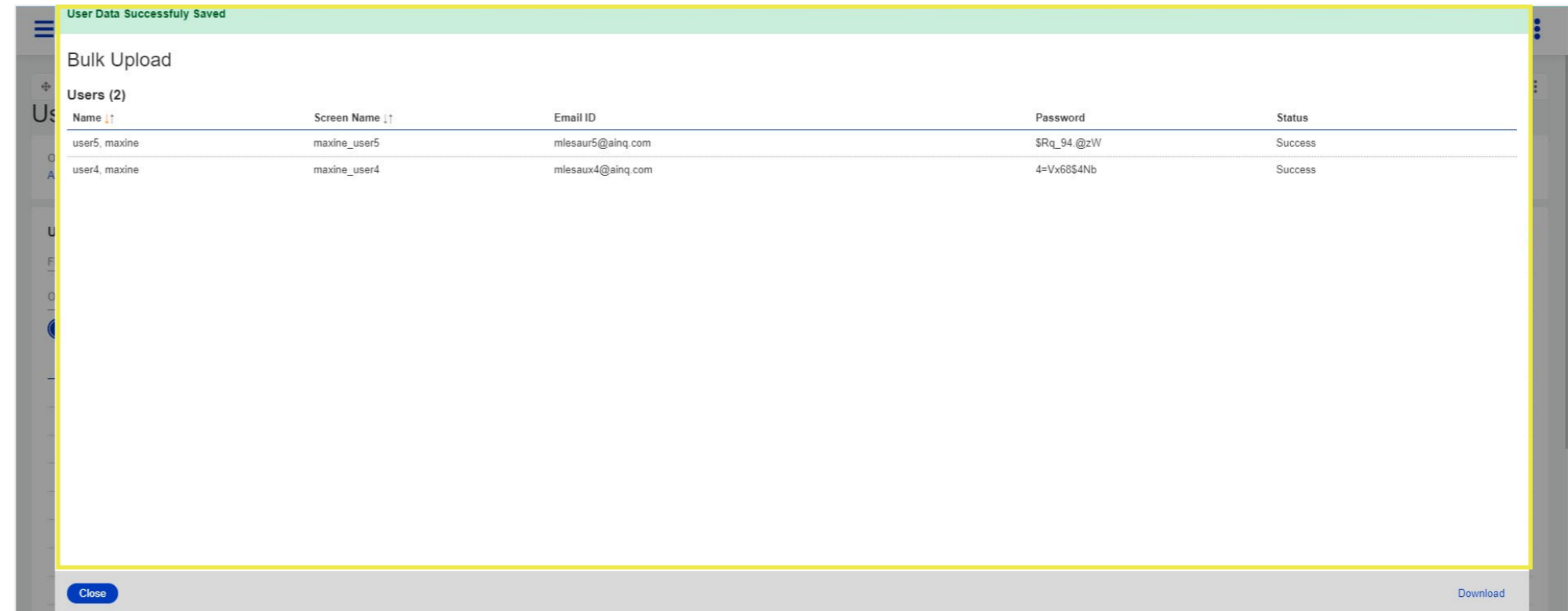
4. After the bulk upload template has been processed by the system, the users will be displayed on the screen. Select the radio buttons next to the user names for which accounts should be created and select the “Save” button



Name	Screen Name	Email ID	NPI	Organization	Role	Privilege	Additional Access
<input checked="" type="radio"/> user4, maxine	Maxine_user4	mlesaux4@ainq.com		Audacious Inquiry	Office Staff		
<input checked="" type="radio"/> user5, maxine	Maxine_user5	mlesaur5@ainq.com		Audacious Inquiry	Office Staff	Org Administrator	

Bulk Upload Users

- Once the user accounts have been created, a green banner will be displayed across the top of the screen that says, “User Data Successfully Saved”. Users will receive emails to set their account password.



User Data Successfully Saved

Bulk Upload

Users (2)

Name	Screen Name	Email ID	Password	Status
user5, maxine	maxine_user5	mlesaur5@ainq.com	\$Rq_94_@zW	Success
user4, maxine	maxine_user4	mlesaux4@ainq.com	4=Vx68\$4Nb	Success

Close Download

Editing User Accounts

1. Navigate to the User Management Portal. Search for a User or locate their name from the User list. Select the User's name.

ORG NAME
Audacious Inquiry

Users (1)

First Name	Last Name	Screen Name
test	testerson	

Organization	Role	Privilege

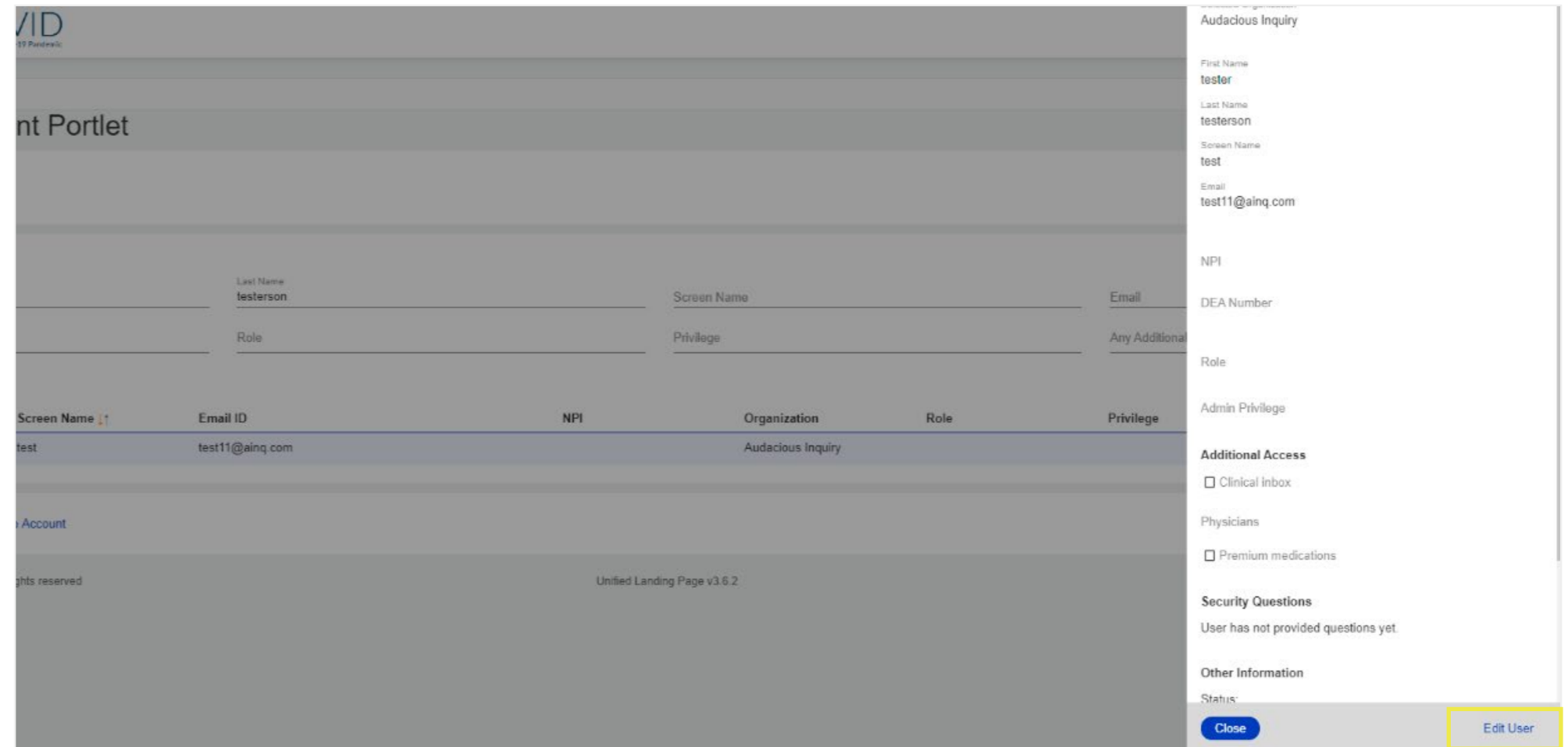
Active Inactive

Name ↓↑	Screen Name ↓↑	Email ID	NPI
<input checked="" type="checkbox"/> testerson, tester	test	test11@ainq.com	

[Reset Password](#) [Deactivate Account](#)

Editing User Accounts

2. A window will appear on the right-hand side of the screen to show the User account details. To edit these details, select the “Edit User” button.



The screenshot displays a user management interface. On the left, a table lists user accounts. On the right, a detailed view of a user account is shown, including fields for personal information, access permissions, and security questions. The 'Edit User' button is highlighted with a yellow border.

Screen Name	Email ID	NPI	Organization	Role	Privilege
test	test11@ainq.com		Audacious Inquiry		

User Account Details:

- Organization: Audacious Inquiry
- First Name: tester
- Last Name: testerson
- Screen Name: test
- Email: test11@ainq.com
- NPI: [Empty]
- DEA Number: [Empty]
- Role: [Empty]
- Admin Privilege: [Empty]
- Additional Access:
 - Clinical inbox
 - Premium medications
- Security Questions: User has not provided questions yet.
- Other Information: Status: [Empty]

Buttons: Close, Edit User

Editing User Accounts

3. Input any changes to the user's information and select the "Save"

Audacious Inquiry [Change](#)

First Name
Test

Last Name
Admin

Screen Name
dummyadmin

Email
admin122@ainq.com

NPI

DEA Number

Role

Admin Privilege

Additional Access

Clinical inbox

Physicians

Premium medications

Other Information

Status:
Active

Lockout Date:

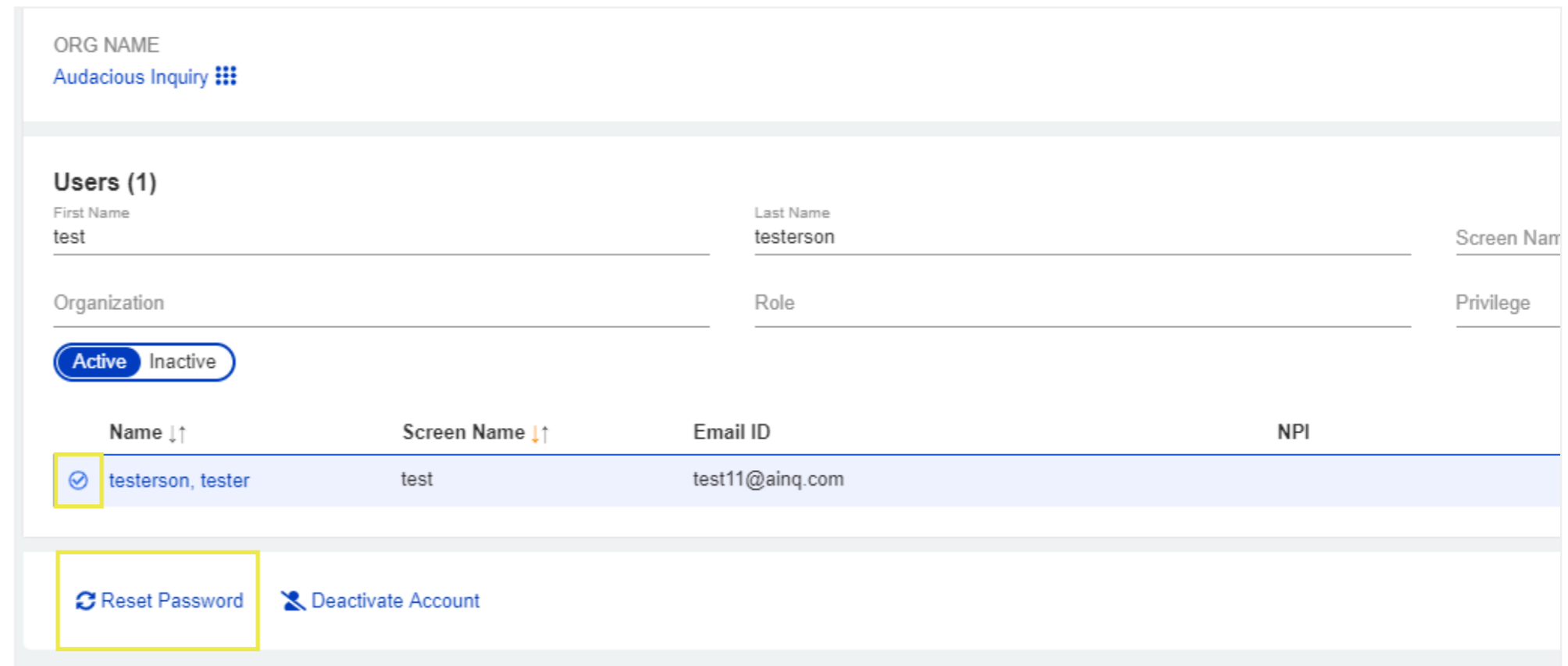
Created: 2020-04-15 4:27:47 pm

[Save](#) [Cancel](#)

Reset User Passwords

Users can reset their own passwords; however, Administrators and Unit Managers can also conduct password resets for Users.

1. Navigate to the User Management Portal. Search for the desired User or locate their name on the User list. Select the radio button next to the User's name. Select the 'Reset Password' button at the bottom of the screen.



ORG NAME
Audacious Inquiry

Users (1)

First Name	Last Name	Screen Name
test	testerson	

Organization

Role

Privilege

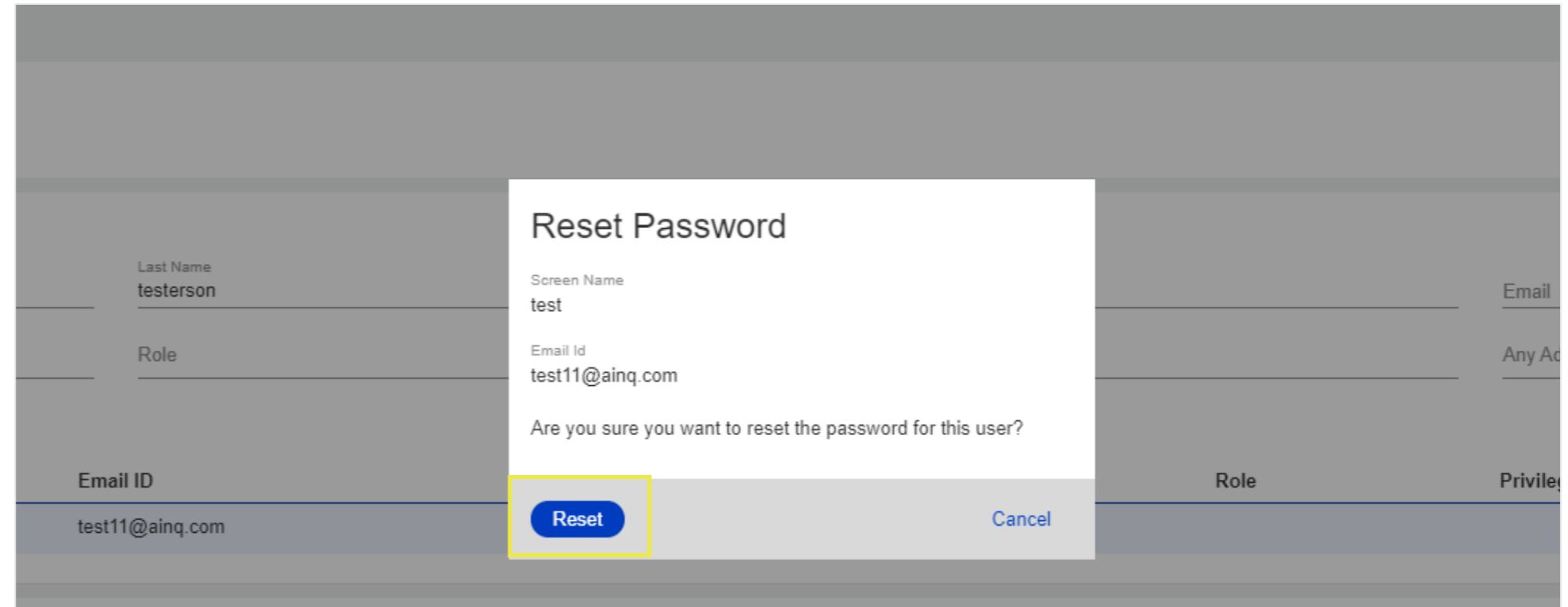
Active Inactive

Name ↓↑	Screen Name ↓↑	Email ID	NPI
<input checked="" type="checkbox"/> testerson, tester	test	test11@ainq.com	

Reset Password Deactivate Account

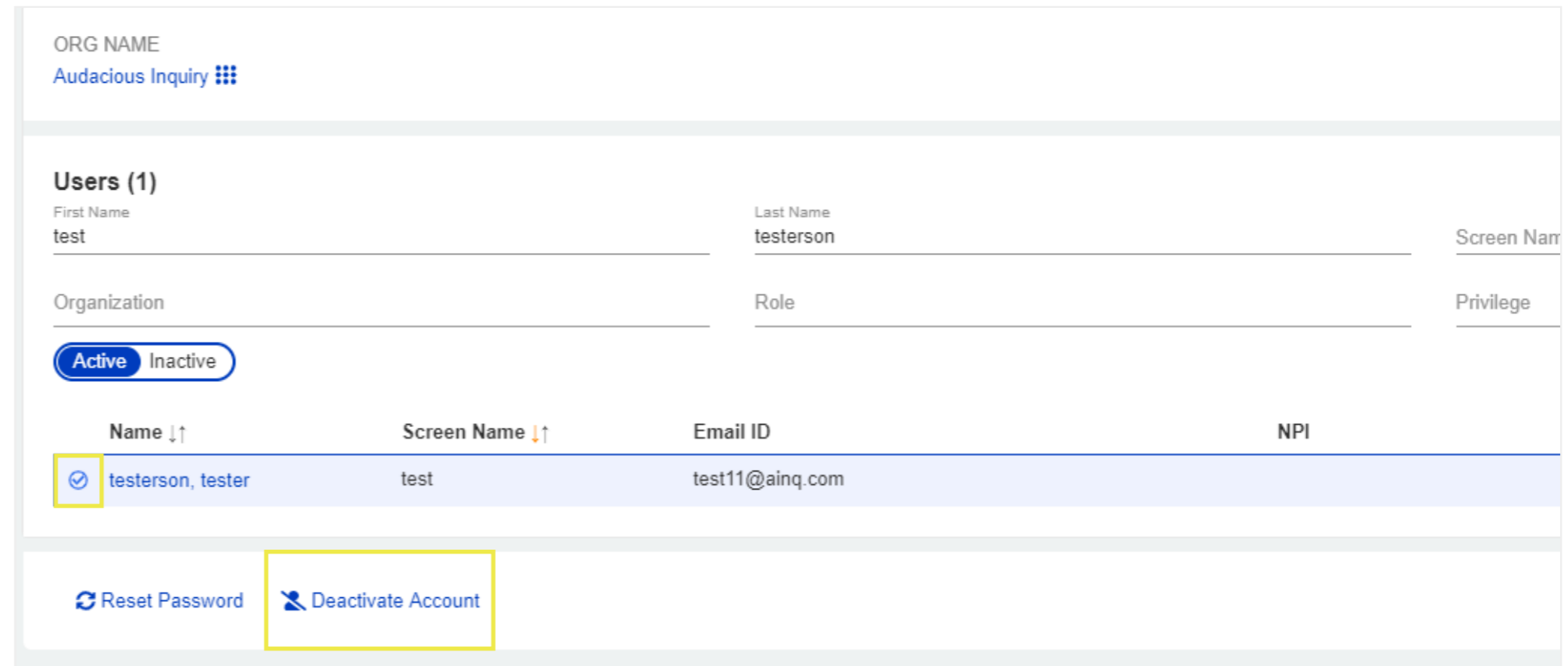
Reset User Passwords

2. Select the 'Reset' button. A new password will be generated for the User. The user will receive an email with an individualized link to set their password.



Deactivate User Accounts

1. Navigate to the User Management Portal. Search for a User or locate their name from the User list. Select the radio button on the left side of the User's name. Select the "Deactivate Account" button on the bottom of your screen.



ORG NAME
Audacious Inquiry

Users (1)

First Name	Last Name	Screen Name
test	testerson	

Organization

Role

Privilege

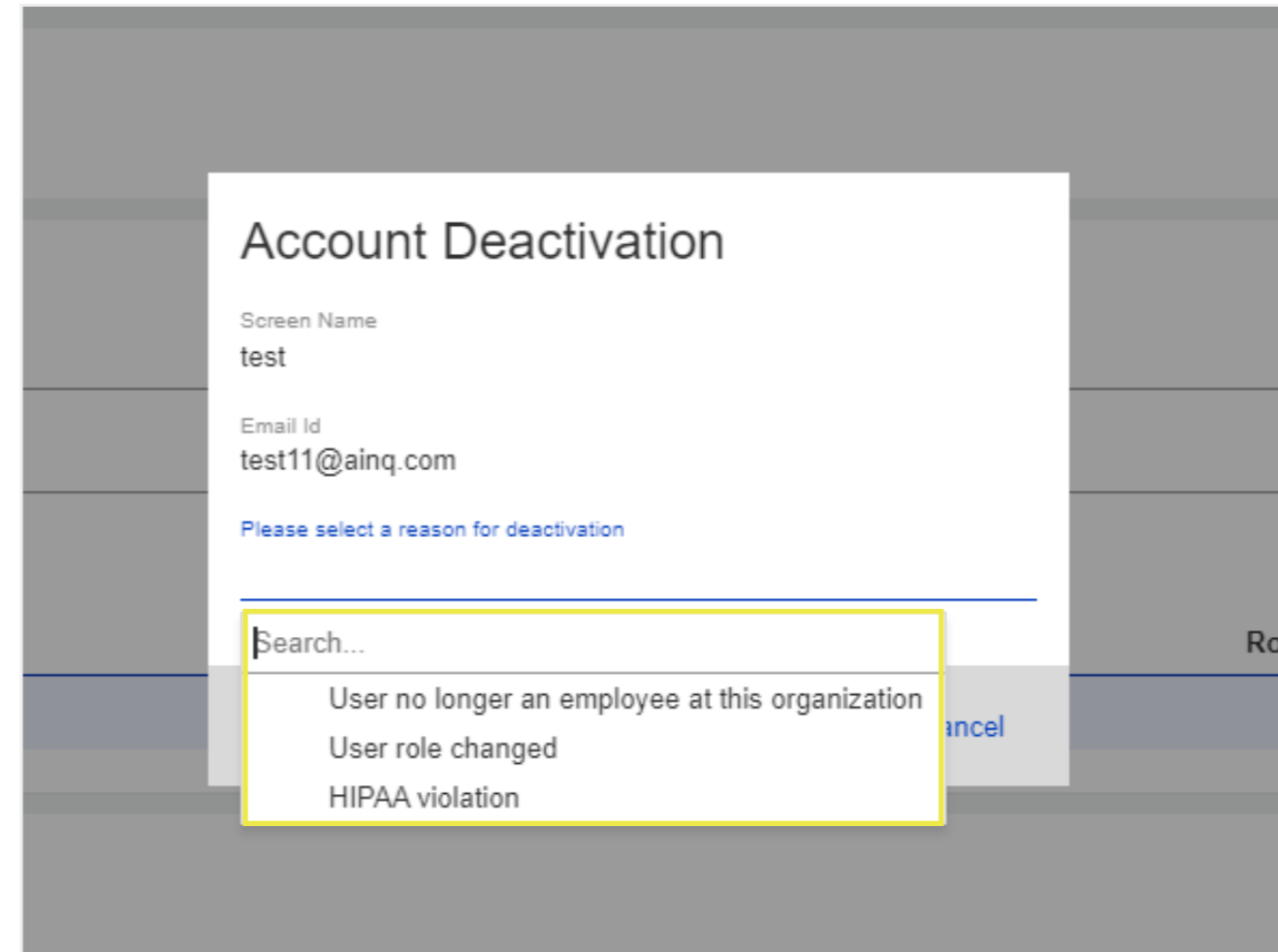
Active Inactive

Name ↓↑	Screen Name ↓↑	Email ID	NPI
<input checked="" type="checkbox"/> testerson, tester	test	test11@ainq.com	

[Reset Password](#) [Deactivate Account](#)

Deactivate User Accounts

2. A pop-up window will appear. Select the reason for deactivation from the drop-down list. Once a reason for deactivation has been selected, select the “Deactivate” button. The User will no longer be able to log in to their account. The User will be displayed in the Inactive User panel.



The screenshot shows a pop-up window titled "Account Deactivation" with the following fields and options:

- Screen Name: test
- Email Id: test11@ainq.com
- Text: Please select a reason for deactivation
- Search input field: Search...
- Dropdown menu options:
 - User no longer an employee at this organization
 - User role changed
 - HIPAA violation
- Cancel button

PULSE Service Desk

The PULSE COVID Service Desk is the portal to input any requests related to technical support. Administrators only have access to the Service Desk.

