

User Access Guide

Requesting an Account for a New Primary User

If your facility does not have a primary user, or the designated primary user is not able to access the sepsis portal (e.g., no longer employed by your facility), you may make a direct request to create a new primary user account. To request a new primary user account, the new primary user must [Create a Helpdesk Ticket](#) that includes a request for a primary user account and a **patient facility identifier (PFI)**. Be sure to include both the **name** and **email address** for the new primary user account in your request. In addition, users requesting a new primary user account must **copy their facility's chief security and/or privacy officer** using the 'CC' field when submitting a ticket for account creation.

Support Request

Name

Email

CC

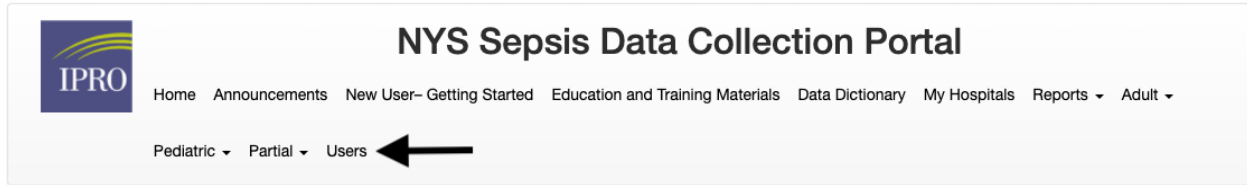
Facility Identifier (PFI)

Subject

Comment

Promoting a Secondary User to a Primary User

To promote an existing secondary user to a primary user, you must first login to the Sepsis Data Portal as a primary user, then click on the **Users** menu item in the navigation menu bar.



On the *User Accounts* page, select **Request a New Primary** at the bottom of the users list

User Accounts

Username	Name	Group	Registered On	
adam.nicholls+testuser@ipro.us	Primary Test	Primary User	12/10/2021	
adam.nicholls+testuser2@ipro.us	Secondary Test	Secondary User	12/13/2021	✕
+Add a New User				
Request a New Primary				

Click on **Request a New Primary** and you will be presented with the following form:

Request a New Primary

New Primary Contact

Secondary Test (adam.nicholls+testuser2@ipro.us) ▼

This will replace selected user with the current primary user below

Primary Test (adam.nicholls+testuser@ipro.us)

Privacy Officer Email

email@email.com

Reset

Submit

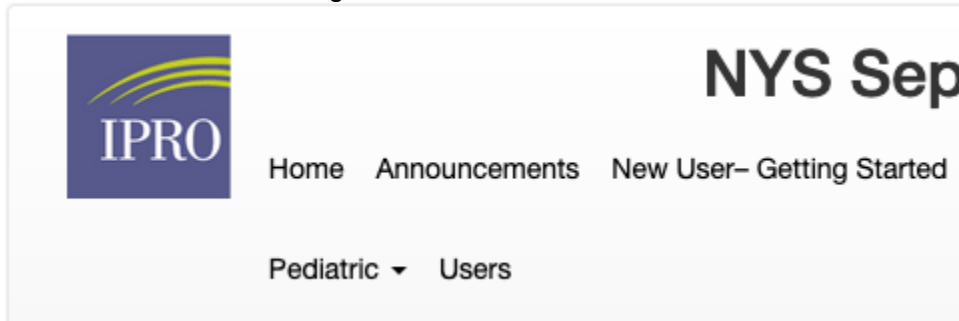
Select the new primary contact from the dropdown list, and enter the email address of the chief security or privacy officer for your facility. To ensure that only authorized individuals have access to sensitive information (including PHI), your hospital's chief security or privacy officer must be copied on the request. Once completed, you may submit the form for us to process. If the primary officer is

a new user not in the dropdown list, you must first add him/her as a new secondary user from the Users page.

How Do I Add Secondary / Additional Users?

Primary users may add additional Users in the application interface:

1. Go to <https://ny.sepsis.ipro.org>
2. Login as a primary user - secondary users cannot add other secondary users.
3. Click on **Users** in the navigation bar:



4. Click **Add a New User**:

User Accounts

Username	Name	Group	Registered On
testuser@ipro.us	Test User	Primary User	06/25/2014
+ Add a New User			

5. Fill out the secondary user's information:

Add a User

Email Address

First Name

Last Name

Reset

Submit

6. Barring any errors, you should see a confirmation message and the new secondary user now listed. This new secondary user will receive an email from 'noreply@ipro.us' to the address they provided during registration with an activation link. Please check your junk/spam folder if you do not receive a confirmation email in your primary inbox.

User has been successfully saved.

User Accounts

Username	Name	Group	Registered On	
testuser@ipro.us	Test User	Primary User	06/25/2014	
kevin@ipro.us	New User	Unconfirmed	07/31/2014	✕
+ Add a New User				

User Permissions for Hospitals

Each hospital that reports sepsis data has a Hospital Group. Each Hospital Group includes at least one hospital, but some Hospital Groups will include multiple hospitals. Hospital Groups must be created and modified in the administrative sepsis user database. To request the creation or modification of a Hospital Group, Primary Users should [Submit a Helpdesk Ticket](#).

There are two types of Users in the Portal: Primary Users and Secondary Users.

All Hospital Groups will have one Primary User. Upon account approval, all Primary Users have permissions to submit cases, attest to zero cases, request file and case level deletions, and view reports on the portal for all hospitals in their designated Hospital Group. The Primary User can also set permissions for and remove secondary users within the Hospital Group.

Hospital Groups can have multiple Secondary Users who, once permissions are granted, can also submit cases, attest to zero cases, request file and case level deletions, and view reports on the portal.

For Hospital Groups with one hospital:

If the Primary User's designated hospital group only contains one facility, **Secondary Users will automatically be granted user permissions for that hospital** upon approval of the Secondary User's account.

Please follow the instructions outlined below to remove user permissions for Secondary Users.

For Hospital Groups with more than one hospital:

If the Primary User's designated hospital group contains more than one facility, **Secondary Users must be manually granted user permissions for their designated hospital by the Primary User**. If a secondary user attempts to submit cases, attest to zero cases, request deletions, and view reports on the portal for a facility for which they do not have permissions, they will receive an error message. Please follow the instructions outlined below to grant or remove user permissions for Secondary Users.

Granting and Removing User Permissions:

1. Primary Users for each Hospital Group can grant or remove facility-specific user permissions for all Secondary Users in their hospital group. To do so, Primary Users must login to the

portal for the appropriate Hospital Group and navigate to the 'Users' page. On the 'Users' page, Primary Users should be able to view all users assigned to their hospital group.

User Accounts

Username	Name	Group	Registered On	Permissions
nmatthes+primary@ipro.org	Nikolas Primary	Primary User	05/12/2023	
primary@ipro.us	Primary Test User	Secondary User	03/26/2014	
secondary@ipro.us	Secondary Staff User	Secondary User	03/26/2014	

Welcome back!

Hello nmatthes+primary@ipro.org

[Change your Password](#)

[Logout](#)

Current Submission Period

8th Reporting Period (Adult)

Submission period for adult cases:
1/1/2023 – 3/31/2023

- To change user permissions for a Secondary User, the Primary User must click the lock icon in the row associated with the Secondary User's account (see below).

User Accounts

Username	Name	Group	Registered On	Permissions
nmatthes+primary@ipro.org	Nikolas Primary	Primary User	05/12/2023	
primary@ipro.us	Primary Test User	Secondary User	03/26/2014	
secondary@ipro.us	Secondary Staff User	Secondary User	03/26/2014	

- After clicking the lock icon, Primary Users will be directed to the target Secondary User's User Permissions page for their hospital group. On this page, all facilities within the Primary User's hospital group will be listed.

To grant user permissions for a given facility, make sure the checkbox next to the facility name is checked.

To remove user permissions for a given facility, uncheck the checkbox next to the facility name.

When you have finished assigning or removing hospital-specific User Permissions, click the 'Submit' button. In the example below, this Secondary User will be granted permissions for 'IPRO Testing Hospital,' and will not be granted permissions for 'IPRO Testing Hospital 2.'

User Permissions for Hospital Group 'IPRO Testing Facility Group'

	Hospital
<input checked="" type="checkbox"/>	IPRO Testing Hospital
<input type="checkbox"/>	IPRO Testing Hospital 2

Submit

4. If the secondary user is successfully assigned permissions, the primary user will be redirected to the 'Users' page, and a green call-out box will appear at the top of the page indicating that user permissions have been set.

User permissions set

User Accounts

Username	Name	Group	Registered On	Permissions	
nmatthes+primary@ipro.org	Nikolas Primary	Primary User	05/12/2023		
primary@ipro.us	Primary Test User	Secondary User	03/26/2014		
secondary@ipro.us	Secondary Staff User	Secondary User	03/26/2014		

Note for Hospital Groups with one hospital:

Upon account approval, new Secondary Users in single-facility hospital groups will automatically be granted user permissions for their designated hospital. For these users, their User Permissions page will only show one checked hospital (see below).

User Permissions for Hospital Group 'IPRO Testing Facility Group'

	Hospital
<input checked="" type="checkbox"/>	IPRO Testing Hospital

Submit

In the event that a Primary User for a single-facility hospital group removes user permissions for a Secondary User and then attempts to regrant permissions to this user, the Secondary User's User Permissions page will appear as below.

User Permissions for Hospital Group 'IPRO Testing Facility Group'

	Hospital
<input checked="" type="checkbox"/>	IPRO Testing Hospital

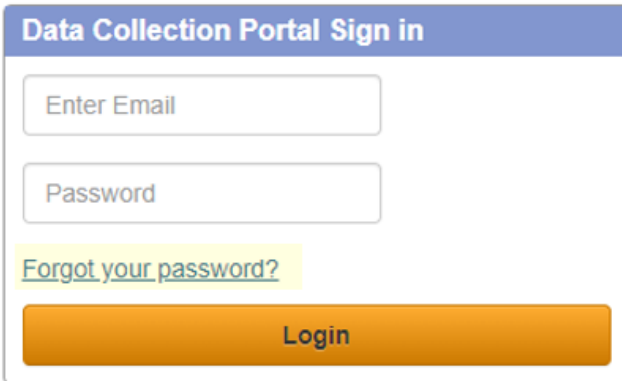
This facility group has one hospital so it is checked by default - user CURRENTLY DOES NOT have permissions.

Submit

Please note that if the blue call-out box underneath the facility name is visible, the secondary user does not yet have permissions for that facility. To assign permissions to the target secondary user, check the box for the facility for which the user should be assigned and click 'Submit.'

Password Reset/Change

To reset or change your password for your Sepsis Data Collection Portal account, click the 'Forgot your password?' link in the Data Collection Portal Sign in window.

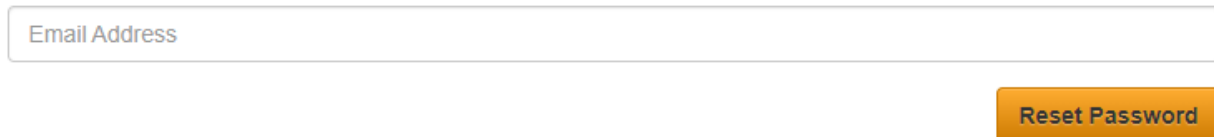


The screenshot shows a sign-in form with a blue header. The header contains the text "Data Collection Portal Sign in". Below the header, there are two input fields: "Enter Email" and "Password". A link labeled "Forgot your password?" is highlighted in yellow. At the bottom of the form is an orange button labeled "Login".

You will then be prompted to enter your email address and click 'Reset Password' before being sent an email from 'noreply@ipro.us' with instructions to reset your password. Please check your junk/spam folder if you do not receive a confirmation email in your primary inbox.

Forgot your Password?

Please enter the email address you used to register



The screenshot shows a form for resetting a password. It has a text input field labeled "Email Address" and an orange button labeled "Reset Password".

Account Suspension and Reactivation

All user accounts must be accessed at least once every 120 days to remain active. Suspended accounts will not be able to log in to the Sepsis Data Collection Portal. Instructions for account reactivation are as follows:

To reactivate a primary user's account, primary users must [Create a Helpdesk Ticket](#) that includes the hospital's PFI and the request to reactivate the suspended primary user's account with your hospital's chief security or privacy officer copied on the request. Tickets requesting the reactivation of primary user accounts without your hospital's chief security or privacy officer copied on the request will be rejected.

To reactivate a secondary user's account, your hospital's primary user must log into the Portal, click **Users** in the navigation bar, find the user whose account has been suspended, and click the checkbox icon on the right side of the User Accounts table (pictured). This will automatically send an

email to the suspended user's registered email address that includes a link for the secondary user to reactivate their account.

User Accounts

Username	Name	Group	Registered On	
		Primary User	12/14/2021	
redspin1@email.com	Red Spin	Suspended	06/25/2014	
		Secondary User	09/24/2021	

reactivate this user