Registration and Account Management User Guide

FOR THE MINNESOTA DEPARTMENT OF HEALTH, HEALTH ECONOMICS PROGRAM (HEP) DATA PORTAL

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Registration and Account Management User Guide

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Purpose

The purpose of this document is to guide reporting entities on the process for registering and managing a reporting organization account on the Minnesota Department of Health (MDH) website for the Health Economics Program (HEP) Data Portal.

Technical requirements

The HEP Data Portal (https://hepdataportalui.web.health.state.mn.us/signinregister) functions on the following browsers: Google Chrome, Microsoft Edge, and Mozilla Firefox.

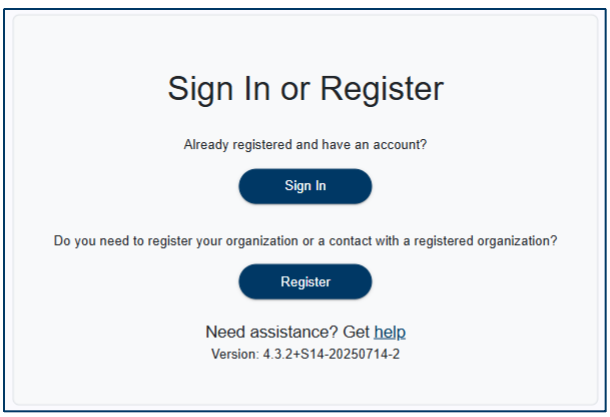
Register

Prior to filing a data set, reporting entities must register a primary contact on the MDH website using the HEP Data Portal (https://hepdataportalui.web.health.state.mn.us/signinregister). Once a request to register has been submitted, MDH will review and approve requests. Approved registrants will receive an email through which they can activate their account and set their password. Successful activation of an account completes the registration process for a primary contact.

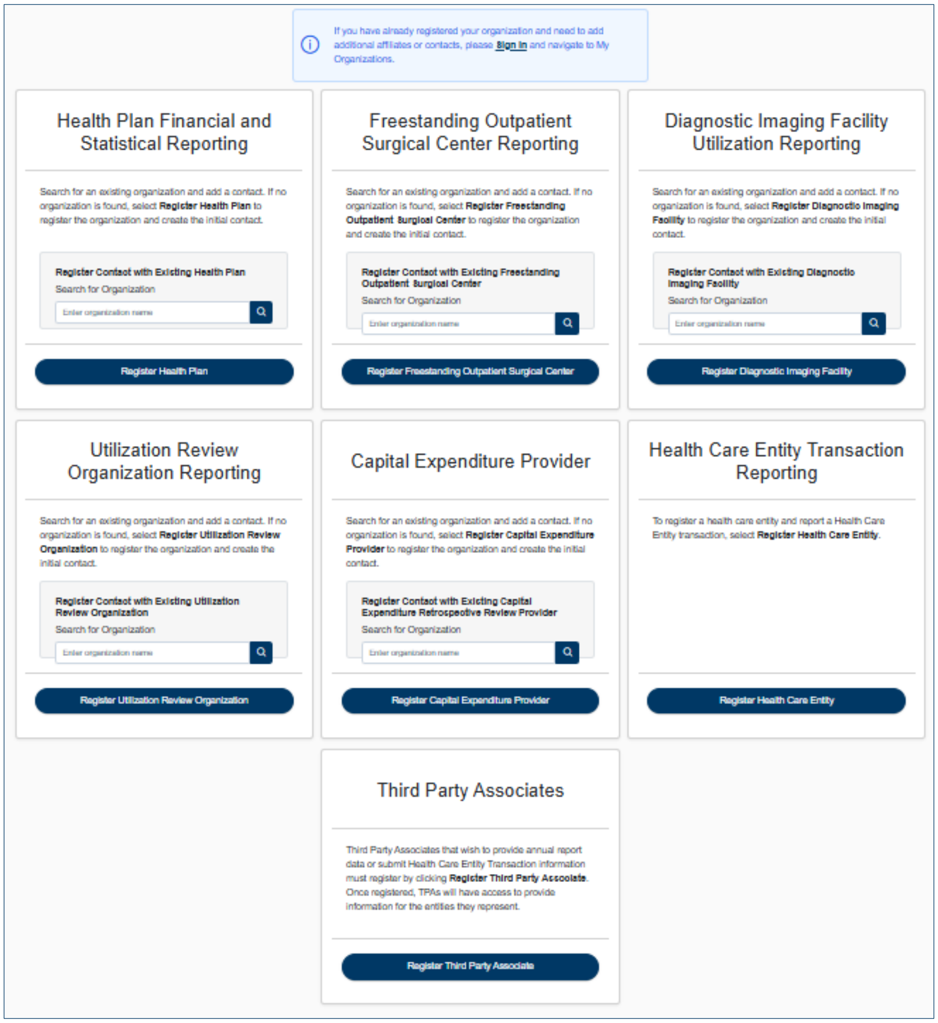
Submit a registration request

By following the steps below, a reporting organization may register a primary contact.

1. Access the HEP Data Portal (https://hepdataportalui.web.health.state.mn.us/signinregister). Click the "Register" button.



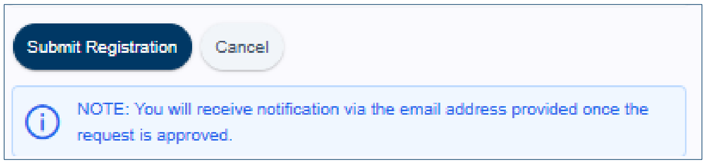
2. Locate the appropriate reporting organization type and click on the associated registration button. Please note that Third Party Associates (TPAs) are registering to report on behalf of entities they represent. TPAs may include accounting firms, law firms, and government compliance organizations.



3. Enter all required information. Registration information will vary based on the reporting organization type.

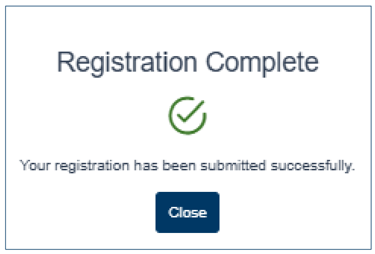
Note: MDH reviews the registration requests to, among other things, verify that a request to establish an organization account is being requested by an individual with an email associated with that organization. Personal emails and emails from Third Party Associates may not be used to register reporting organization accounts. TPAs may register as Third-Party Associates which enables reporting organizations to select the TPA as an affiliate for access to reporting organization reports.

4. Once all required information is entered, click the “Submit Registration” button to submit the registration request.



Note: Only one organization account may be registered per unique email address. Organizations with several affiliates have two options for how to add multiple organizations to the online reporting system. One is to register a primary organization account and later add each organization as an “affiliate” within the system. The other option is to register each organization independently with distinct email addresses for each.

5. A confirmation screen will appear after registration has been submitted. Click the “Close” button.



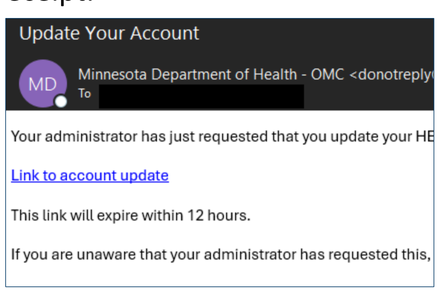
Activate account

Reporting entities will need to activate their account by following the steps below.

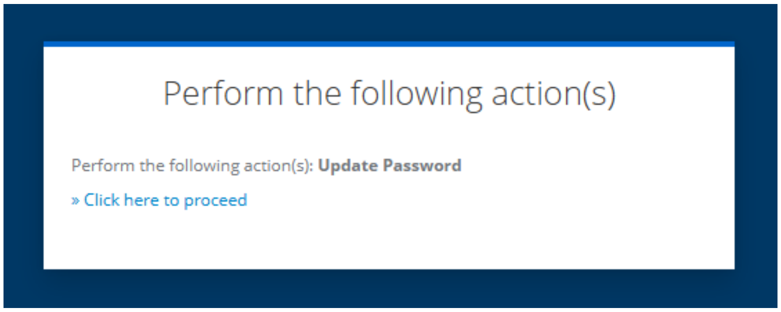
1. After MDH approval, the primary contact will receive an email for account activation at the email address provided. Health Care Entities do not require registration review but are automatically approved and will immediately receive an activation email.

Note: If an activation email does not arrive to your inbox, please check your junk folder and/or confirm with your company’s security department that emails from donotreply_prod@state.mn.gov are not being blocked. If you continue to experience barriers to logging in, please email a brief description of your issue and the troubleshooting efforts you have already employed to: IAMSupport.MNIT@state.mn.us.

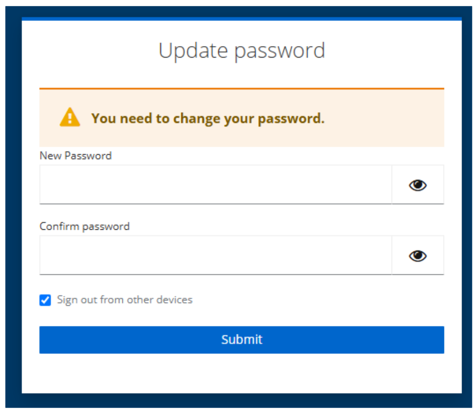
2. Open the email and click “Link to account update.” The link contained in the email will expire within 12 hours of receipt.



3. Clicking the link will open a browser window that prompts users to update their password. Click "Click here to proceed."



4. After entering and confirming the new password, click the "Submit" button.

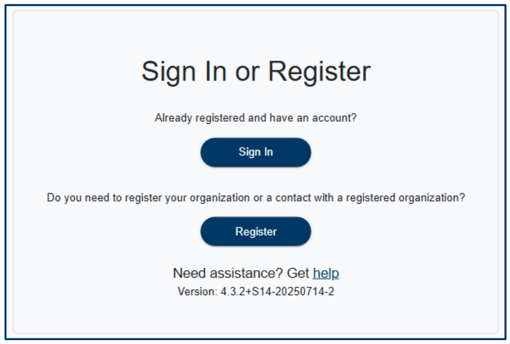


Note: The username (or user login) is the email address that was used for registration. If you are unable to log in after setting or resetting your password, please close your browser and open a new browser window to reattempt logging in. If you continue to experience barriers to logging in, please email a brief description of your issue and the troubleshooting efforts you have already employed to: IAMSupport.MNIT@state.mn.us.

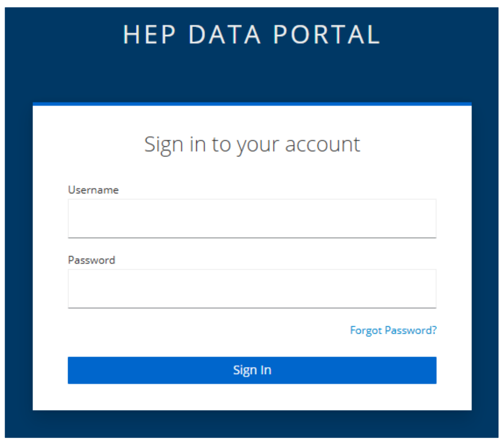
Log in and password recovery

By following the steps below, a reporting organization may log in:

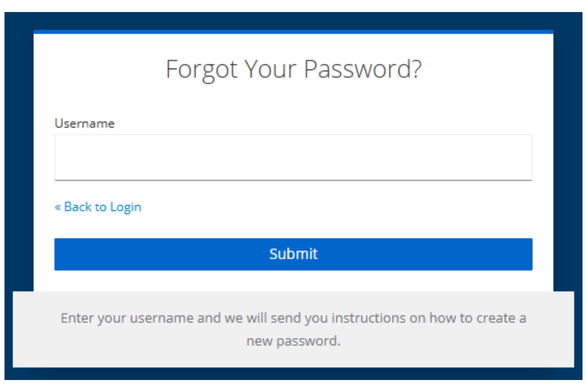
1. Access the [HEP Data Portal (https://hepdataportalui.web.health.state.mn.us/signinregister)](https://hepdataportalui.web.health.state.mn.us/signinregister).
2. Click the "Sign In" button.



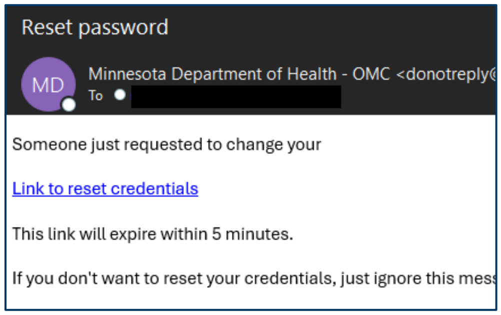
3. Type in your username (email used to register the account) and password, and then click the "Sign In" button.



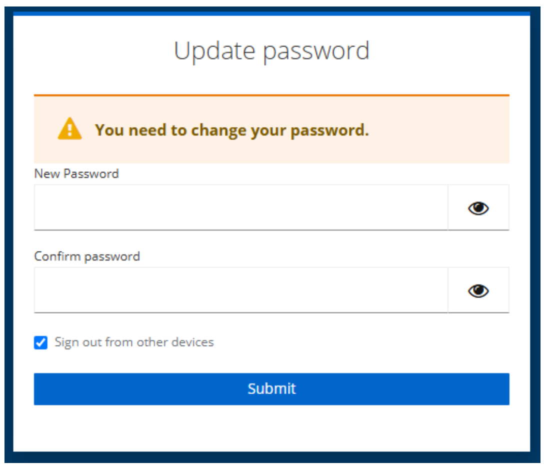
4. If you have registered and have trouble signing in, click the "Forgot Password?" link.
5. Enter your email and click the "Submit" button.



6. Open the password reset email and click “Link to reset credentials.” The link will expire within 5 minutes of receipt.



7. In the window that opens, enter and confirm the new password and click the “Submit” button. You will be directed to the HEP Data Portal Homepage.



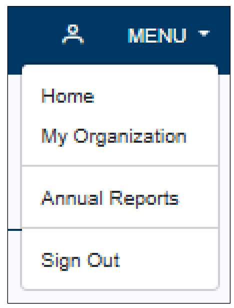
Add and manage affiliates (optional)

Once registered, an organization has the option to add affiliated organizations directly and may establish an affiliation with registered Third Party Associates using a lookup feature, as desired.

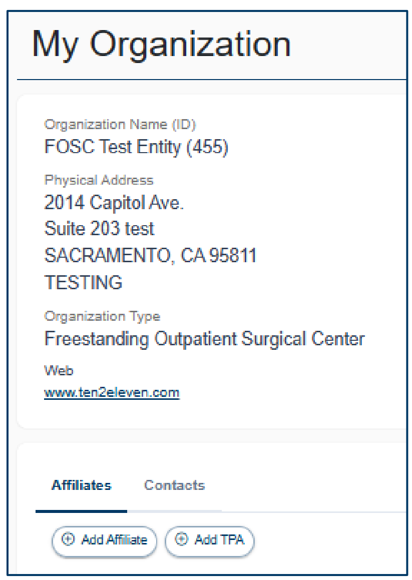
Add affiliates

By following the steps below, an organization may add an affiliated organization:

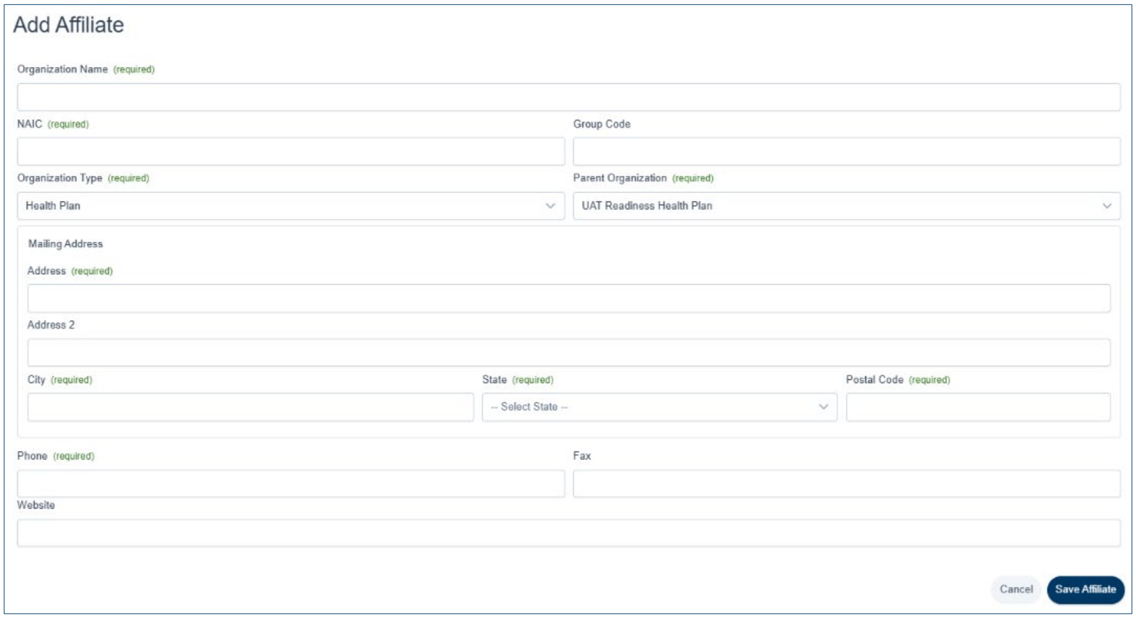
1. From the home page dashboard, click on the drop-down "Menu" located in the upper-right of the window and click "My Organization."



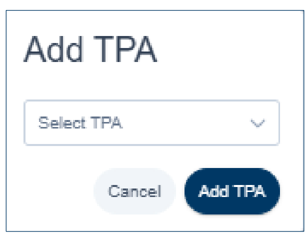
2. From the "Affiliates" tab click on the "Add Affiliate" button to manually add an affiliate or the "Add TPA" button to establish an affiliation with a registered Third Party Associate.



3. If adding an affiliate, enter the business information for the affiliate organization and click the “Save Affiliate” button.



4. If adding a registered Third Party Associate, use the drop-down menu to review the list of registered Third Party Associates, make your selection, and click the “Add TPA” button in the window that appears.



5. The newly added affiliate will appear in the “Affiliates” tab.

Note: The “Parent Organization” field allows users to define the level of access an affiliate and its associated contacts have to data and communications within the system. Parent organizations will have access to information submitted by related affiliates; however, affiliate organizations will not be able to access information submitted by parent organizations.

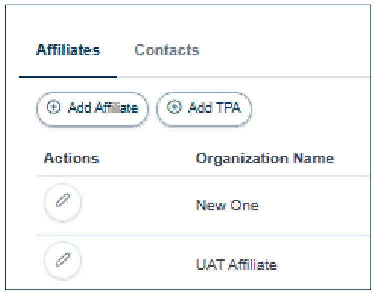
Manage affiliates

Once affiliates have been established, an organization (company) may edit affiliate information, inactivate affiliates, and reactivate inactive affiliates. An organization may remove an affiliation with a Third Party Associate but cannot update information related to the Third Party Associate.

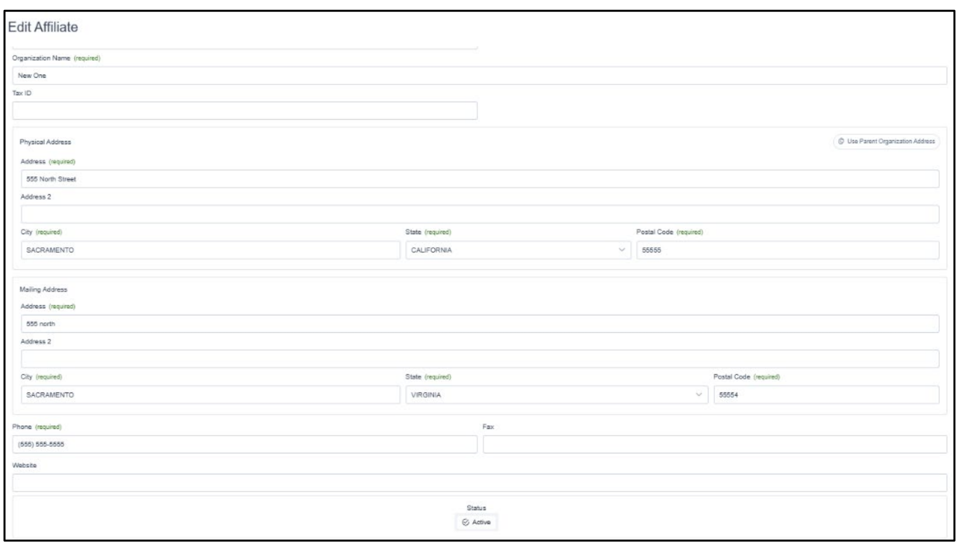
Edit, inactivate, or activate an affiliate

By following the steps below, an organization may edit, activate, or inactivate an affiliate they added manually.

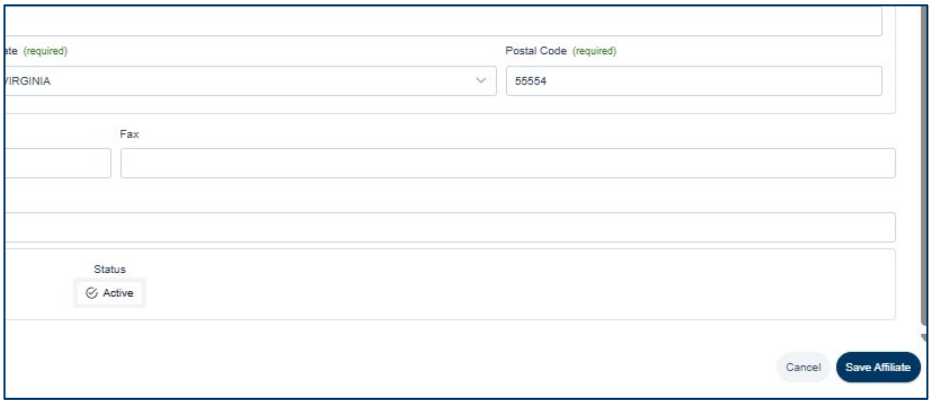
1. On the "My Organization" page, click the "Affiliates" tab, identify the affiliate to modify, and click on the pencil-shaped edit icon to the left of the affiliate's name.



2. In the window that appears, a user may edit the organization information of the affiliate, as well as activate or inactivate the affiliate by clicking the "Active" button at the bottom of the window.



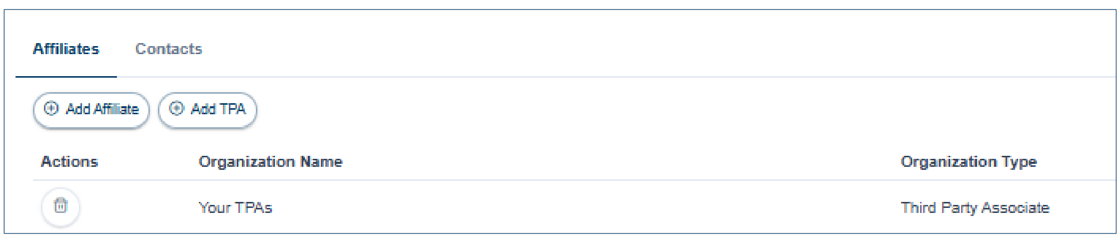
3. Click the "Save Affiliate" button and the affiliate's organization information will be saved.



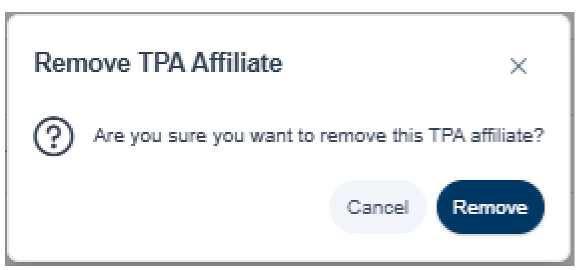
Remove a TPA affiliate

By following the steps below, an organization may remove an affiliation with a Third Party Associate.

1. On the "My Organization" page, click the "Affiliates" tab, identify the Third Party Associate to remove, and click on the garbage-can-shaped delete icon to the left of the affiliate's name.



2. In the window that appears, confirm the affiliate's removal by clicking the "Remove" button.



3. The Third Party Associate will no longer appear in the list of affiliated organizations on the "Affiliates" tab of the "My Organization" page and will no longer be able to access records related to the organization.

Add and manage contacts (optional)

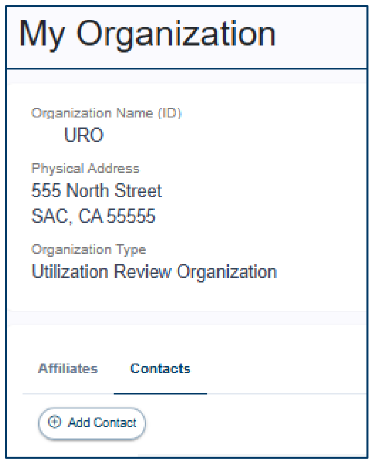
Once registered, a reporting organization has the option to add additional contacts.

Note: The contact information associated with the organization account will be MDH's primary means of contacting reporting entities. Reporting entities should consider adding additional contacts to their account to ensure continuity of communication with MDH.

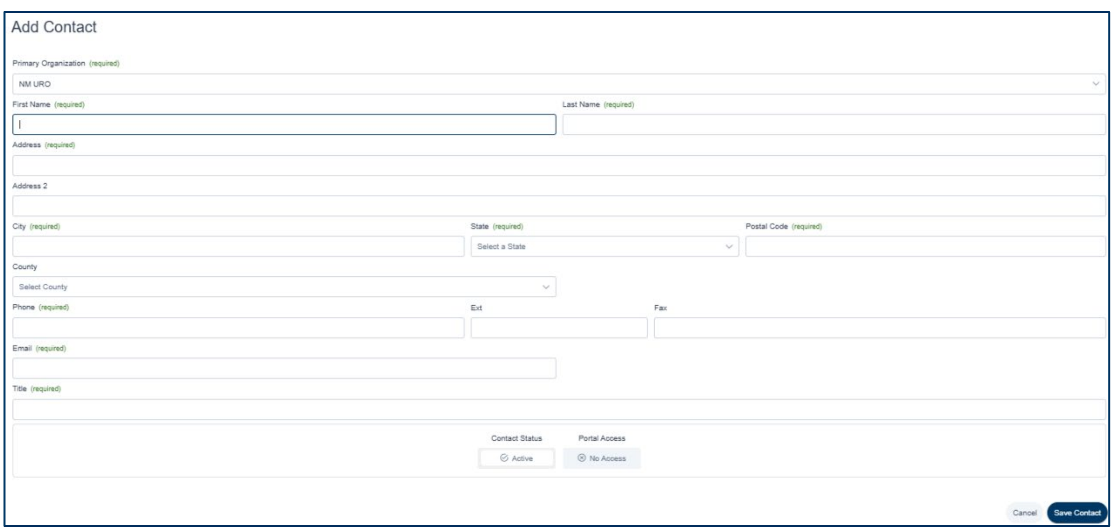
Add contacts

By following the steps below, a reporting organization may add a contact:

1. On the "My Organization" page, click the "Contacts" tab and click the "Add Contact" button.



2. In the window that appears, enter the contact information, and click the "Save Contact" button. If the new contact should have access to the portal, click on the "No Access / Has Access" toggle button so that the toggle displays "Has Access."



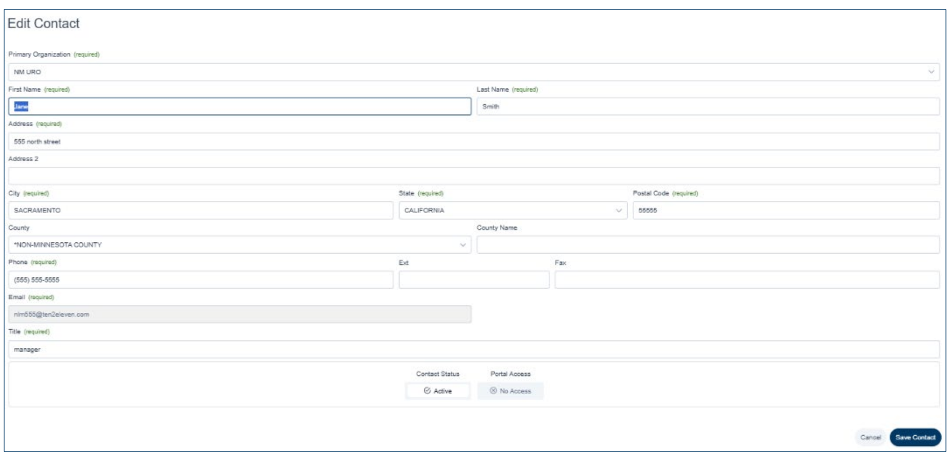
Note: The "Primary Organization" field allows users to define the level of access a contact has to data and communications within the system based on the affiliate to which they are primarily assigned. Contacts will have access to submit and review information for the primary organization that is selected and any affiliates (children) of the primary organization; however, contacts will not be able to access information submitted for higher level (parent) organizations of the primary organization that is selected.

3. The newly added contact will appear in the "Contacts" tab. An activation email will be sent to the new contact, and no additional approval will be required by MDH. Refer to "Activate Account" instructions.

Manage contacts

By following the steps below, a reporting organization may edit the information of, activate, or inactivate contacts.

1. On the "My Organization" page, click the "Contacts" tab, identify the contact to modify, and click on the pencil-shaped icon to the left of the contact's name.
2. In the window that appears, a user may edit the contact information of the contact. Additionally, a user can be activated or inactivated or have portal access or no access by clicking on the status buttons at the bottom of the window.



3. Click the "Save Contact" button and any modifications to the contact's information or statuses will be saved.