# EMSTR ADMINISTRATOR GUIDE EMPLOYEE ACCOUNT MANAGEMENT



TEXAS Health and Human Services

Texas Department of State Health Services

# Texas Emergency Medical Services and Trauma Registries (EMSTR) Administrator Guide Employee Account Management

November 2024

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# Introduction

Texas Department of State Health Services (DSHS) Emergency Medical Services and Trauma Registries (EMSTR) is a statewide surveillance system collecting reportable event data from EMS providers, hospitals, justices of the peace, medical examiners, and rehabilitation facilities.

EMSTR monitors and analyzes Texas EMS and trauma care system data by integrating National EMS Information System (NEMSIS) Version 3.5, National Trauma Data Bank (NTDB) / International Trauma Data Exchange (ITDX) 2020 and 2023 hospital data standards, and Texas-specific questions.

EMSTR uses data from 22 Texas trauma services areas / regional advisory councils (RACs) to benchmark and compare Texas with other states and conduct epidemiological investigations to identify public health issues. By identifying public health issues, stakeholders can use data to support injury prevention initiatives, enhancing the efficiency and quality of care for patients in Texas.

DSHS developed this guide as a tool for organization / facility administrators regarding ongoing administrative management of user accounts.

# Adding a User to Your Entity

Each organization / facility user request will go through a three-tier approval process:

- Organization / facility administrator approval;
- Data steward (DSHS staff) approval; and
- Data owner (DSHS program management) approval.

## **EMSTR User Types**

Application access is grouped by role. There are three EMSTR application role types:

- EMSTR view only Level 1;
- EMSTR add / edit Level 2; and
- EMSTR Admin Level 3.

#### **Definitions:**

- EMSTR view only Level 1: end-users who need limited application access.
- EMSTR add / edit Level 2: organization / facility users who **submit data for their facility** but are not facility administrators.
- EMSTR Admin Level 3: organization / facility administrators.

#### Add a User – *Each step is explained in detail throughout the guide.*

- Step 1 The user requests an Identity and Access Management Online (IAMOnline) account as an additional user.
- Step 2 The organization / facility administrator approves the IAMOnline account request.
- Step 3 The user receives an IAMOnline account activation email from OKTA (an automated security system supporting IAMOnline access.)
- Step 4 The user submits the level of access requested on the Manage User Access Dashboard or the administrator can do it for them instead of receiving a request.
- Step 5 The organization / facility administrator approves the EMSTR access request.
- Step 6 The account goes through additional DSHS-level approvals; and

Step 7 – The user receives access to the EMSTR application and the requested facility data.

#### **IAMOnline Account Request**

An organization / facility administrator must first register a **New Facility Account** in IAMOnline before having any other staff register as <u>additional users</u>.

**NOTE:** If joining an existing account, your organization / facility name or Tax ID number must match <u>exactly</u> on the EMSTR **Additional User Registration Form**. Please contact EMSTR staff at **injury.web@dshs.texas.gov** if you're unsure whether your organization / facility already has an EMSTR account.

#### **Supervisor Dashboard**

Organization / facility administrators can select the **Supervisor Dashboard** tile to:

- View access requests.
- Manage organization / facility users.
- Track requests.



The **Approvals** tile shows how many request(s) the organization / facility administration needs to review. Click the **"Approvals"** tile to review requests.

EXAS Later and Mark						
🗮 Home My Work 🗸						
🖀 Home						
Manage Access(Beta) > Sign AUA Form	>	Policy Violations	Approvals 1	>	Manage User Access	>
					Track My Requests	>
			Approva	s :	>	

**Note:** The tile will turn blue.

Your organization / facility account requests will display on the **Approvals** screen. Click **"Approve"** to approve a request.

After selecting **Approve**, a pop-up **Complete Approval** box will appear. Click **"Complete"** to confirm the account update.

## **Assigning EMSTR Access to a User**

#### **Manager User Access**

After approving the account request, you must assign the appropriate EMSTR access. Click "Manage Partner organization" from the Manage Partner organization menu.

🗙 Home My Work -				Ø 🌲	Hospital 👻
■ My Tasks ~					🖌 Edit
Manage Access ^	Policy Violations	Approvals >			
Manage My Access	0	0	Manage My Access 🔉		
Manage Accounts					
Manage Partner organization	IS Both 🗸	My Access Reviews		Latest Approvals	
🗑 Manage identity 🛛 🗸					
% EFT Access Request Form ~					
∿ DSPP Access ~ :	o data	Currently no	data	Currently no data	

Select the user by clicking the checkmark box – it will turn green. Click the "**Next**" button.

1 Select Users Find and select users for whom you want to manage access.	2 Manage Access Add access for the users you've selected.	3 Review and Submit Look over your selections and confirm.
Search Users		Q Tilters 🗸
Merestilies Selected Employee Hospital Here you will see your username and email	Showing 1-2 of 2 Employee Username: #3711718222 Manager: Hospital	<b>~</b> At
kdenzikies Selected: Employee	Showing 1-2 of 2	
	Next	

Type **"EMSTR"** in the text box and click the magnifying glass icon. **Note** – The **Identities Selected** is the user you are managing access for your organization / facility.

1 Select Users Find and select users for whom you want to manage access.	2 Manage Access Add access for the users you've selected.	3 Review and Submit Look over your selections and confirm.
Add Access Search By Keywords ✔ EMSTR		
Identities Selected: Employee		

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Choose the appropriate access level by clicking the checkmark box – it will turn green. Click "**Next**".

	Add Access		Remove Access
	Search By Keywords 🗸	EMSTR	T filters 🗸
Mentities Selected: Employee		Showing 1-3 of 3	
EMSTR Hospital Admin Level 3			
EMSTR Hospital Admin Level 3 Type: Role Owner: HHS_WG_DSHS_EMSTR_	Data Stewards		
EMSTR Hospital Add Edit Level 2			
Hospital Add/Edit (Level 2) Type: Role Owner: HHS_WG_DSHS_EMSTR_	Data Stewards		
EMSTR Hospital View Only Level	1		
Hospital View Only (Level 1) Type: Role Owner: HHS_WG_DSHS_EMSTR_	Data Stewards		
Identities Selected: Employee		Showing 1-3 of 3	
		Previous	

Click the message bubble icon. This step is required.

1 Select Users Find and select users for whom you want to manage access.	2 Manage Access Add access for the users you've selected.	3 Review and Submit Look over your safections and confirm.	9
Identities Selected: Employee			
Add Access 1 items selected			٠
EMSTR Hospital Add Edit Level 2			Details
Hospital Add/Edit (Level 2) Type: Role Owner: HHS_WS_DSHS_EMSTR_Data Stemands			
			•
			~

### **Business Justification / Assignment Note**

Type a justification for approving the request. An example is shown here.

Business Justification and Assignment	Note	×	
Business Justification	Assignment Note		
Approving request for [user] to	access [facility]		
		h	3 Ret
	c	ancel Save	
	Business Justification and Assignment Business Justification Approving request for [user] to	Business Justification and Assignment Note           Business Justification         Assignment Note           Approving request for [user] to access [facility]         .	Business Justification and Assignment Note   Business Justification   Assignment Note   .   Approving request for [user] to access [facility]     Cancel

The EMSTR system requires a comment for all requests. Click the "Save" button.

The message bubble will turn green. Click the "Submit" button.

1 Select Users Find and select users for altion you want to manage access.	2 Manage Access Add access for the users you've selected.	3 Review and Submit	Details
Identifies Selected Employee		-	
Add Access 1 items selected			
* EMSTR Hospital Add Edit Level 2			Details
Hospital Add/Edit(Sevel 2) Type:: Role Owner: HHS, NG, DDHS, EVSTR, Data Stewards			
	Subr	nit	
	Previous Cancel Submit		

A pop-up screen will appear. Click the "**Complete Form**" button. Review details and click the "**Approve**" button.

You have an Approval pending, complete it now or later. Later		
Manager Approval - Account Changes for User: Employee   1 Request Requested on: Oct 23, 2023 4:21:12 PM Requested by: Crystal Hospital Work Item ID: 24600		
🔹 Approve All 🦛 Deny All		0 🗭 🗉
Add: EMSTR Hospital Add Edit Level 2	0 🔎	🔹 Approve 👎 Deny
Hospital Add/Edit (Level 2)		

Click the "Complete" button.

		_	
Complete	Complete Approval		
You have	You have completed all items in this approval. Click <b>Complete</b> to complete the approval or <b>Cancel</b> to change your decisions.		
Later	Cancel		
Manager A Requested or	Approval - Account Changes for User:     Employee   1 Request       0: 0ct 23, 2023 4:21:12 PM     Requested by     Work Item ID: 24600		and sour sele
Add: EMST	R Hospital Add Edit Level 2	() Saving	
	dd/Edit (Level 2)		

The system will redirect you to the **MyApps** dashboard where you will see **Approval** submitted successfully and the user account in the **Direct Reports** section.

	Approval submitted successfully.							✓ Edit	
	,	Sign AUA Form 🔸	Policy Violations	>	Approvals >	Manage User Access	>		
						Track My Requests	•		
Approval	submitted succe	essfully	My Access Reviews			Latest Approvals			
	Currently no da	ata	c	urrently no d	lata	Curr	ently no data		
	AL 3		ALD	[		4.5			
	Latest Forms		Direct Reports		Direct Reports		Search for		۹
	Currently no da	ata	Employee		Employee			۹, ۵	

The user now needs DSHS data steward and data owner approval. Only after all three approvals are complete will the user be able to access the **EMSTR** tile on their **MyApps** dashboard.

The system will send the user an email notification indicating the access request was approved.

# **Approve or Deny User's EMSTR Access Request**

To approve or deny your user's access request, click the "Manage User Access" tile.

TEXAS Reach and Ruman Services	Q Search your apps					IAMOnline 🗸
My Apps Acceptable User Agreem My Applications Add section ④	EMSTR Online	Authorized Help Guide	Manage Access (Beta)			
Notifications (2)	⊗ My Applications         Image: Supervisor Dashboard         Image: Supervisor Dashboard         Image: Supervisor Dashboard         Image: Supervisor Dashboard	Forms	Manage My Access	Manage User Access	Access Requests	Register Partner Organization
Last sign in: a few seconds ago						
Privacy						

Select the **"Home"** button at the top left of the webpage.

Extended Automatic		
Home My Work -		€ 🔎 uats
# Hor		🖌 Edit
M pta) 🔉 Sign AUA Form	Policy Violations Approvals 0 2	Manage User Access
La Both 🗸	My Access Reviews	Latest Approvals
Home		Approval For Requester Date
i i o i i o		Hos Hos 10/27/23 11:17 >
Currently no data	Currently no data	WebServiceAcc Bob Smith 10/27/23 9:27 >

After selecting **Home**, you will see the **Approvals** tile. Select the **"Approvals"** tile to navigate to your approval queue. Click on that tile to go to the **Approvals** page. On the **Approvals** page, you can **"Approve"** or **"Deny"** the request.

Home My Work •     Approvals 2     Sort By • Filter • Collapse All     Search Work Item ID or Requestee Name     Manager Approval - Account Changes for User:     Hospital1     Hospital1     Namager Approval - Account Changes for User:     Hospital1     Nequested on: Oct 27, 2023 11:17:15 AM     Requested on: Oct 27, 2023 11:17:15 AM     Requested by:     Hospital1     Nork Item ID: 24945     • Approve All     • O • E	EXAS Intel and function			
Approvals 2 Sort By Y Filter V Collapse All Search Work Item ID or Requestee Name Q Manager Approval - Account Changes for User: Hospital1   1 Request Requested on: Ox 27, 2023 11:17:15 AM Requested by: Hospital1 Work Item ID: 24945	🗮 Home My Work -		0 <b>4</b> 0	UATS 👻
Manager Approval - Account Changes for User: Hospital1   1 Request Requested on: Oct 27, 2023 11:17:15 AM Requested by: Hospital1 Work Item ID: 24945	Approvals 🛛	Sort By 🗸 🛛 <b>T</b> Filter 🗸 Collapse All	Search Work Item ID or Requestee Name	٩
🔶 Approve All 💗 Deny All	Manager Approval - Account Changes for User:         Hospital1   1 Request           Requested on: Oct 27, 2023 11:17:15 AM         Requested by:         Hospital1         Work Item ID: 24945			^
	🖸 Approve All 🔫 Deny All		0	• =
Add: EMSTR Hospital Add Edit Level 2	Add: EMSTR Hospital Add Edit Level 2		0 🗩 🎝 🎍 Approve	Deny

Click the **"comment bubble"** to review the business justification and determine if you want to approve the request. Here is an example of when you click the **comment bubble** and see the business justification to determine if the request should be approved.

EXAMPLE AND A CONTRACT OF A CO				1	
₩ Home My Work -	Approv	al Item Comments	×	6 <b>4</b> 0	UATS 👻
Approvals 💿	0	I need EMSTR Hospital Add Edit Level 2 access to run reports. Hospital1 © 10/27/23 11:17 AM		earch Work Item ID or Requestee Nam	ne Q
Manager Approval - Account Changes for User: Ma Requested on: Oct 27, 2023 11:17:15 AM Requested by: Mackenzi					^
📽 Approve All 🛛 🤫 Deny All	<b>9</b> T	ype your comment here			0 🗭 🗏
Add: EMSTR Hospital Add Edit Level 2			Cancel Post	0 🗭 1 🖬 Appro	ve 🤫 Deny

Once you approve the request, leave a comment for tracking purposes. This step is <u>required</u>. After leaving a comment, select the **"Post"** button to save the comment.

TEXAS Back and Research	Approval Item Comments	•
🗮 Home My Work 👻		<b>∂ ≜</b> (4) UATS →
Approvals 🛛	I need EMSTR Hospital Add Edit Level 2 access to run reports. Hospital1 © 10/27/23 11:17 AM	earch Work Item ID or Requestee Name
Manager Approval - Account Changes for User: Mar Requested on: Oct 27, 2023 11:17:15 AM Requested by: Mackenze & Approve All Reprove All	O The administrator approves this request.	^ 0 • =
Add: EMSTR Hospital Add Edit Level 2	Cancel Post	0 🗩 1 🗤 Approve 🤏 Deny

To add another comment before approving or denying the request, click the **"comment bubble"** button.

To approve the request, select the **"Approve"** button. To deny the request, select the **"Deny"** button.

Approvals 2	Sort By 🗸	▼ Filter ∨	✓ Collapse All	Search Work Item ID or Requestee Name	٩
Manager Approval - Account Changes for User:         Hospital1   1 Request           Requested on: Oct 27, 2023 11:17:15 AM         Requested by:         Hospital1         Work Item ID: 24945				,	•
🔹 Approve All 🛛 🔫 Deny All				0 • =	
Add: EMSTR Hospital Add Edit Level 2				0 🗩 2 🖬 Approve 👎 Deny	
Hospital Add/Edit (Level 2)					1

After selecting **Approve** or **Deny**, a **Complete Approval** box will appear. Select the **"Complete"** button to submit the request. Select the **"Cancel"** button to delete the request.

Once you complete the review process, the system will send the user an email to notify them the access request was approved or denied by their organization / facility administrator. The user now needs DSHS data steward and data owner approval.

After all approval levels are complete, the user will see the **EMSTR** tile on their **MyApps** dashboard.

# **Removing a User From Your Entity**

All users can remove their own EMSTR access in **IAMOnline**. This section will provide instructions for organization / facility administrators to remove a user from their organization / facility account.

To remove a user, click on the "Manage User Access" tile from MyApps dashboard.



**NOTE:** Removing a user's access does not require a verification process. The user will immediately lose EMSTR access. Select the user by clicking the checkmark box by their name.

🗧 Home My Work 🗸		😯 🌲 Crystal Hospital 🛩
1 Select Users Find and select users for whom you	want to manage access. 2 Manage Access Add access for the users you've selected.	3 Review and Submit Look over your selections and confirm.
Search	n Users	Q T Filters V
Identities Selected: None	Showing 1-2 of 2	✓ All
✓ Hospital	Employee	
Username: om Manager: Account	Username: e8711718222 Manager: Hospital	

The checkmark box will turn green. After selecting the checkmark box icon, click the "Next" button.

Search Users	▼ Filters ∨		
Identities Selected: Employee			
snowing 1-2 or 2			✓ All
Hospital Employee			
Username: Username: e8711718222 Manager: Hospital			
Account			
Identities Selected: Employee Showing 1-2 of 2			
Next			

### Select the "Remove Access" button. The box will turn from white to grey.

Manage User Access					<b>€</b> Help
<b>Select Users</b> Find and select users t	for whom you want to manage acco	ass. 2 Manage Access Add access for the users	you've selected.	3 Review and Submit Look over your selections and confirm.	
	Add Access	[		Remove Access	
	Search By Keywords 🗸	Search Access		Q T Filters 🗸	
Identities Selected:	Employee				

Type **"EMSTR"** in the text box. Click the "**magnifying glass"** icon button.

Select Users Find and select use	rs for whom you want to manage access.	2 Manage Access Add access for the users you've selected.	<b>3</b> Review and Submit Look over your selections and confirm.
	Add Access		Remove Access
	EMSTR		Q T Filters 🗸
Identities Selected:	Employee	Showing 1-12 of 29	
Access Requests			Details
		Previous Next	

Select the assigned role by clicking the "X" icon. The X icon will turn from white to red.

Identities Selected: Employee	Showing 1-2 of 2			
EMSTR Hospital Add Edit Level 2		Details		
Status:       Assigned         Hospital Add/Edit (Level 2)         Type:       Role         Owner:       HHS_WG_DSHS_EMSTR_Data Stewards				
Hospital Add/Edit (Level 2)		Details		
	Previous			

Click the "Next" button. Click the "message bubble" icon button to type a comment. Note – The system requires you to add a comment.

Select Users Find and select users for whom you want to manage access.	2 Manage Access Add access for the users you've selected.	3 Review and Submit Look over your selections and confirm.
Identities Selected: Employee		
Remove Access 1 items selected		•
× EMSTR Hospital Add Edit Level 2		Details
Hospital Add/Edit (Level 2)		
Type: Role Owner: HHS_WG_DSHS_EMSTR_Data Stewards		
	Previous Cancel Submit	

Type a comment in the text box. Click the "**Save**" button. An example comment is shown below.

	Comment	×	
or whom you Employee	Employee is leaving the organization and no longer needs access.	Save	A

After you leave a comment, the message bubble will turn from white to green. Click "**Submit**". **Reminder** – The selected user will <u>immediately</u> lose EMSTR access.

1 Select Users Find and select users for whom you want to manage access.	2 Manage Access Add access for the users you've selected.	3 Review and Submit Look over your selections and confirm.
dentities Selected: Employee		
Remove Access 1 items selected		•
× EMSTR Hospital Add Edit Level 2		Details
Hospital Add/Edit (Level 2)		
Type: Role Owner: HHS_WG_DSHS_EMSTR_Data Stewards		
	Previous Cancel Submit	
	© Copyright 2021 SaliPoint Technologies - All rights reserved.   Powered by SaliPoint Identi	R/Q

To verify the user is removed, click the "**Track My Requests**" tile.

:=	Home	My Work 👻							?	٨	Hospital 👻
1	Home										🖋 Edit
	Manage Av	ccess(Beta) <b>&gt;</b>		Sign AUA Form	>	Policy Violations >	Approvals :	>	Manage User Access >		
									Track My Requests 🔉		
	Latest Vio	ation Work	ltems	Both 🗸		My Access Reviews			Latest Approvals		

Access Request details will display indicating:

- **Request Access** by employee name.
- **Request** completion date.
- The type of role removal.

Request Access:     Employee       Requested by     Hospital on 10/24/23       Request completed on 10/24/23	Access Requests 🗿	Sort by: Date 🗸	<b>↓F Filter ∨</b> Se	arch by Identity, Request ID or Externa
✓ Request completed on 10/24/23	Request Access: Employee Requested by Hospital on 10/24/23 Request ID: 33953			Details >
	✓ Request completed on 10/24/23			
Remove Role: EMSTR Hospital Add Edit Level 2 Complete	Remove Role: EMSTR Hospital Add Edit Level 2	Complete		

Removing access is <u>immediate</u> and does not require further verification.

# Account Management

Follow the IAMOnline steps located in the IAMOnline Job Aid if you forget your password or need to reset your password.

**NOTE:** After multiple incorrect password attempts, your account will lock. You will receive an email notifying you that your account will automatically unlock after 30 minutes.

#### **Update Your Account**

On the right side of your **IAMOnline** dashboard, click the arrow to display the menu. Select the **"Settings"** link.



Click the **"Edit"** button in the **Personal Information** section. You can update your personal information such as:

- Add a phone number.
- Add details.
- Adjust security methods including password and security questions.

#### **EMSTR Resources**

For additional information, please visit EMSTR's **New Platform Resources Page**. Contact **injury.web@dshs.texas.gov** if you have questions.

Emergency Medical Services and Trauma Registries dshs.texas.gov/injuryprevention/ems-trauma-registries