Practice Transformation Organization (PTO) Members

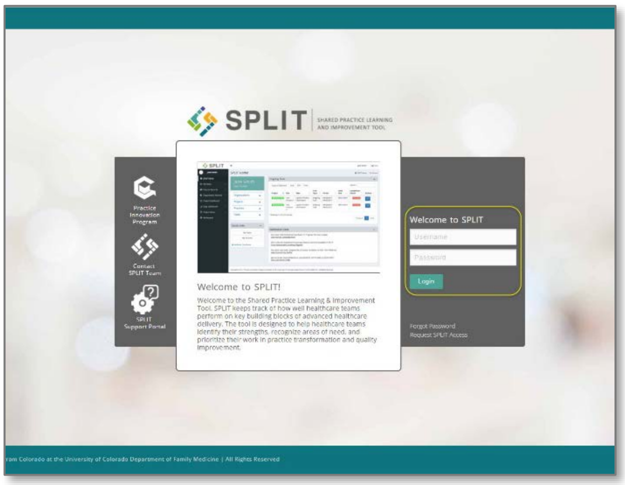
How to update Practice Transformation Organization (PTO) contacts in SPLIT.

Overview:

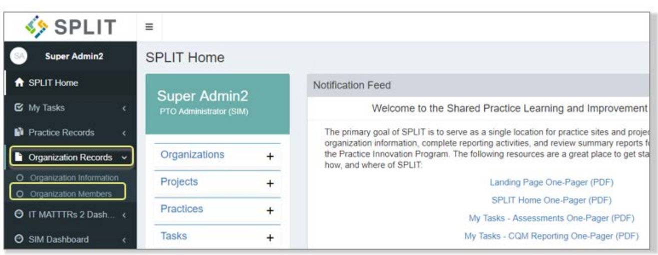
As PTOs will often make changes to their organization contacts, they may need help quickly updating their PTO Members in SPLIT. This can be completed by following the instructions below.

Instructions:

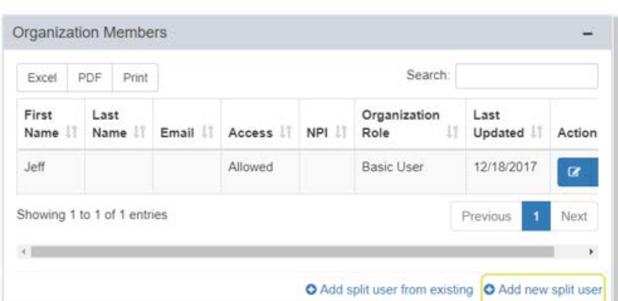
Navigate to the SPLIT Landing Page (https://split.practiceinnovationco.org) to log into SPLIT.



1) Select “Organization Records” from the column on the left
2) Click on “Organization Members”



3) Select “Add New SPLIT User” at the bottom right of the roster



4) Enter the Required Fields in this section “First Name, Last Name, User Status (Active), Email, Organization Role (PTO User – individual access or PTO Administrator – global visibility), and Access Status (Allowed)”

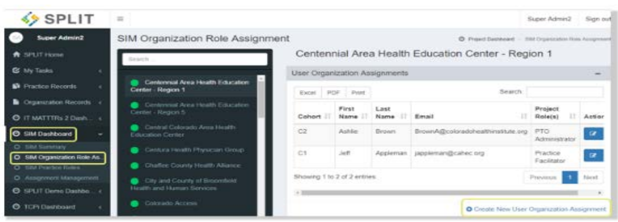
5) Click on “Create”

Assigning Permissions to the New PTO Member:

6) Select “(Project – SIM, TCPi, etc.) Dashboard” from the column on the left

7) Click on “Project Organization Role Assignment”

8) Click on “Create New User Organization Assignment” at the bottom right of organization assignments



9) Select the Cohort you are making this update for

10) Select a SPLIT User ID

11) Assign a Project Role Group (PF, CHITA, or PTO Administrator – global visibility)