

Add Practice Site Members

How to add practice site contacts in SPLIT. There are 3 steps involved: 1) Update Practice Site Roster 2) Update Project Practice Roles 3) Update Practice Contacts.

Overview:

As Practice sites will often make changes to their practice site contacts, they may need help quickly updating their Practice Site Members in SPLIT. This can be completed by following the instructions below.

Definition of Terms:

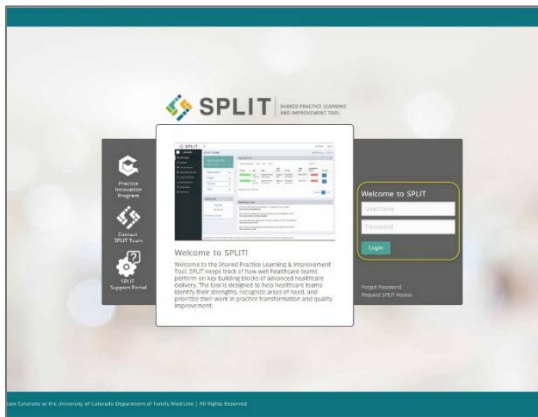
Practice Site Roster – A list of all staff and providers at the practice.

Project Practice Roles – Any practice members that need to access documents and tasks in SPLIT.

Practice Contacts – The practice members that need to receive project related communications.

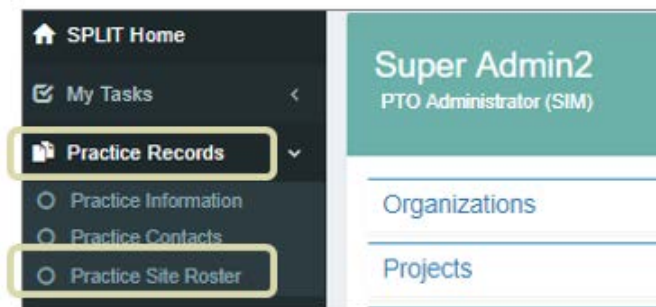
Instructions:

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



Adding Practice Member to Roster (all staff and providers at the practice):


- 1) Select “Practice Records” from the left column
- 2) Click on “Practice Site Roster”



- 3) Select “Add New Practice Member” at the bottom right of the roster



- 4) Enter the Required Fields in this section “First Name, Last Name, User Status (Active), Email, Practice Role (Basic User – individual access, Practice Administrator – global visibility, or Provider – has a National Provider Identifier (NPI), Access Status (Allowed)” Add NPI for Provider
- 5) Click on “Create”

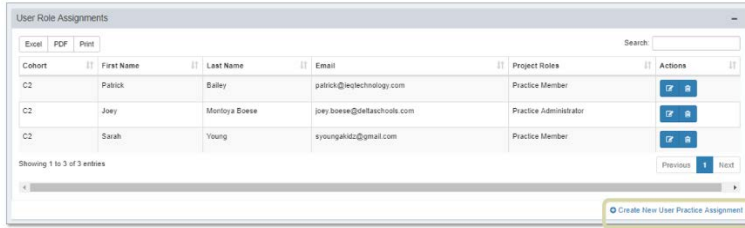


Adding Practice Member to Project (practice members who need access to documents and tasks in SPLIT):

- 6) Select “(Project – SIM, TCPI, etc.) Dashboard” from the left column
- 7) Click on “(Project – SIM, TCPI, etc.) Practice Roles”



8) Click on “Create a New User Practice Assignment” at the bottom right of role assignments

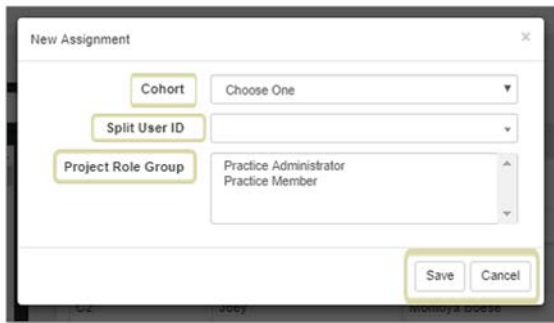


9) Select the Cohort you are making this update for

10) Select a SPLIT User ID

11) Assign a Project Role Group

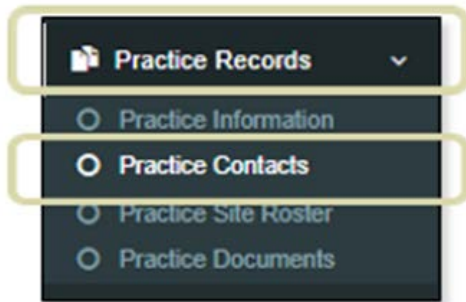
12) Click on “Save”



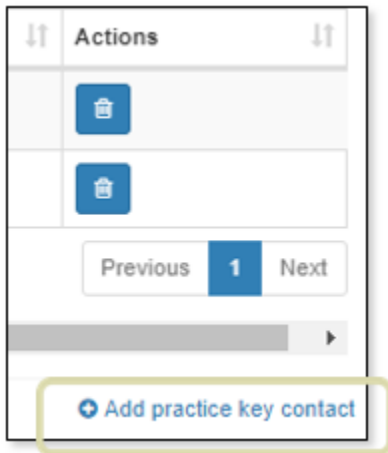
Adding Practice Member to Key Contacts (practice members who need to receive project communications):

13) Select “Practice Records” from the left column

14) Click on “Practice Contacts”



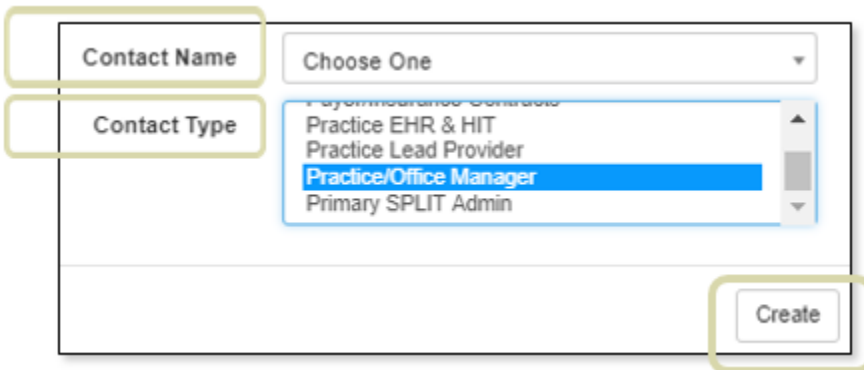
15) Select “Add Practice Key Contact” at the bottom right of the Practice Key Contacts



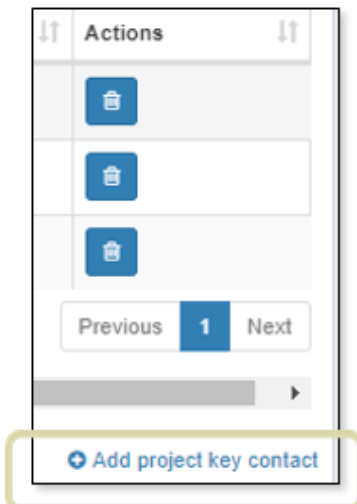
16) Select the Contact Name

17) Contact Type “Practice/Office Manager” will receive project communications

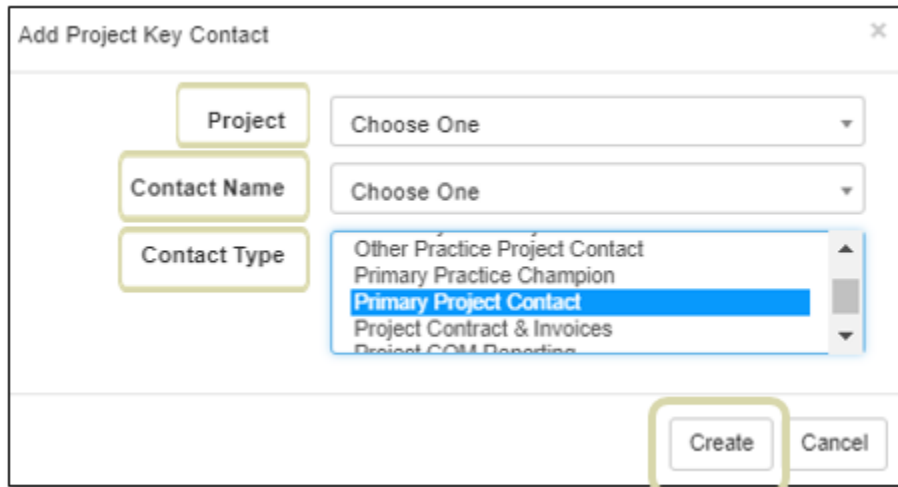
18) Click on “Create”



19) Select “Add Project Key Contact” at the bottom right of the Project Key Contacts



- 20) Select the Project
- 21) Select the Contact Name
- 22) Contact Types “Primary Project Contact” and “Alternate Project Contact” will receive project communications (please designate only one “Primary Project Contact”)
- 23) Click on “Create”



Add Project Key Contact [X]

Project Choose One

Contact Name Choose One

Contact Type

- Other Practice Project Contact
- Primary Practice Champion
- Primary Project Contact**
- Project Contract & Invoices
- Project COM Reporting

Create Cancel