

CPCI Tip Sheet

This document outlines how to make changes in CPCI. Directions to quick fixes that the user can make are in the table below. If you have any questions, or need Azara's assistance to complete your desired change, please email support@azarahealthcare.com.

For most of these changes administrative privileges are needed. If you would like to request privileges, please contact your local CPCI Super User.

Types of Changes	Done by Health Center	Done by Azara
Users		
Create user	Anyone with User Administrative privileges can create a new user.	
Modify user privileges	Anyone with User Administrative privileges can modify user privileges.	
Reset other user password	Anyone with User Administrative privileges can reset another user's password.	
Disable user	Anyone with User Administrative privileges can disable a user.	
Unlock account		Accounts automatically unlock after five minutes.
Provider		
View current members in provider group	Anyone with Provider Administrative privileges can view current members in a provider group.	
Make a new provider group	Anyone with Provider Administrative privileges can add a new provider.	
Add or Remove provider from provider group	Anyone with Provider Administrative privileges can remove a provider.	
Add provider		The new provider information added to your EHR will automatically flow over to Azara.
Location		
Add a new location	Determine (a) if the location should be merged with other existing CPCI locations and (b) Let Azara know what you would	Please contact Azara for assistance.

	like to call the location in CPCI.	
Make a new location group	Anyone with Location Administrative privileges can make a new location group.	
Add or remove locations from a location group	Anyone with Location Administrative privileges can add or remove a location to or from a location group.	
Labs		
Add a new lab	Provide the lab name in the system and where it is needed to be mapped to.	Please contact Azara for assistance.
Payer Group		
Add a new payer group		Please contact Azara for assistance.
Custom Scorecards		
Add a new custom scorecard	Provide the measures you would like in the scorecard, the desired default period type (year, month, trailing year, etc.), and the default provider type (rendering or usual providers).	Please contact Azara for assistance.
Patient Visit Planning Report		
Configure alerts on or off, to display or hide alerts from the Patient Visit Planning Report		Please contact Azara for assistance.
Add new alerts		Please contact Azara for assistance.

When to Call Azara

To maintain good quality data please contact Azara when:

- There is a hardware or software upgrade or change to the EHR.
- Changes to your server.
- Changes to workflow, processes or documentation. (e.g. if there are changes in the way you document and record Nutritional and Physical Activity Counseling for the UDS Child and Adult Screening measures, provide screenshots of where and how you are now documenting those changes)
- Changes to lab vendor's causes changes to lab codes.

CPCI Administration Instructions for Health Center Admins/Super Users:

Users

Create User:

1. Go to the "Administration" menu, select "Security Administration" and click on "User Administration".
2. In the left corner, select "Create New". A screen will appear to add user name (email), name, title, center and provider. Once completed, press "Create".
3. At this point, select group assignments that are desired for the new user and click "Save".

Modify User Privileges:

1. Go to the "Administration" menu, select "Security Administration" and click on "User Administration".
2. For the user you would like to modify privileges for, select "Groups" from the drop down menu in the right hand column.
3. Select privilege you would like to change and select "Save" to confirm changes.

Reset Other User Password:

1. Go to the "Administration" menu, select "Security Administration" and click on "User Administration".
2. For the user you would like to modify privileges for, select "Reset Password" from the drop down menu in the right hand column.
3. An email with a link to reset the password will be sent to the email listed for the user.
4. The user should follow the steps in the email to reset the password.

Providers

View current members of your group:

1. Select the "Administration" menu, select "Application Configuration", and click on "Provider Administration".
2. Click on the "Provider Groups" tab to find current groups. Select the desired group that you would like to see the current members in.

Add a new provider group:

1. Select the “Administration” menu, select “Application Configuration”, and click on “Provider Administration”.
2. Click on “Provider Groups”, name your group and press “Create”. A success message will appear on the screen indicating that a group was created.
3. Select the “Providers” screen, check boxes to the left of the providers you want to include, select “Add to Group”, and choose the provider group you desire.

Add or Remove members from group:

1. Select the “Administration” menu, select “Application Configuration”, and click on “Provider Administration”.
2. Click on “Provider Groups” and select the group you would like to remove a member from.
3. Check the box to the left of the provider’s name you would like to remove from the group and click the “Remove” button.

***Individual providers may be added to provider groups through the same steps. Instead of selecting “Remove”, select “Add”.

Location

Make a New Location Group:

1. Under the “Administration” menu, select “Application Configuration” and select “Location Administration”.
2. Select the “Location Groups” tab. Create a location group name by typing the name and clicking “Create”.
3. Select the “Locations” tab. Check the boxes to the left of the locations you would like to add to the group. Once all desired location are selected click the “Add to Group” button above the name and chose the group you created.

Add or Remove location from location group:

1. Select the “Administration” menu, select “Application Configuration”, and click on “Location Administration”.
2. Click on the “Location Groups” tab and select the group you would like to remove a location from.
3. Check the box to the left of the location’s name you would like to remove from the group and click the “Remove” button.

***Existing locations may be added to location groups through the same steps. Instead of selecting “Remove”, select “Add”.