Supporting Documentation

User Guide for the Onpoint Performance Reporting Portal (PRP)

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# Table of Contents

Welcome to the Onpoint Performance Reporting Portal.................................................. 3
Exploring Onpoint PRP ........................................................................................................... 4
  Dashboard .......................................................................................................................... 5
    Receiving Default Dashboards ....................................................................................... 5
    Using & Navigating Widgets ......................................................................................... 6
    Adding Widgets to an Existing Dashboard .................................................................... 11
    Creating a New Dashboard ........................................................................................... 15
    Managing Dashboards ..................................................................................................... 16
Measurement ..................................................................................................................... 18
  Viewing Self-Reporting-Level Measure Results ............................................................... 18
  Viewing Additional Reporting-Level Measure Results .................................................. 21
Master Provider Directory .................................................................................................. 27
  Editing Existing Primary Care Practitioners ................................................................. 27
  Adding New Practitioners ............................................................................................... 30
  Managing Practitioners’ Affiliated Organizational Attributions .................................... 33
  Editing Existing Organizations ....................................................................................... 37
  Creating New Organizations ............................................................................................ 39
Reporting ............................................................................................................................. 40
  Using & Navigating Reporting Styles ............................................................................. 40
User Management ............................................................................................................ 47
  Editing Existing Users .................................................................................................... 47
  Create New Users .......................................................................................................... 49
Documentation .................................................................................................................. 52
Help & Support ................................................................................................................... 53
Welcome to the Onpoint Performance Reporting Portal

Onpoint Health Data is an independent, nonprofit organization offering a comprehensive suite of data services and analytic solutions to the healthcare community nationwide. For more than 40 years, our dedicated staff have been providing trusted data and insightful analysis to help the communities that we serve power their healthcare transformation efforts.

Beginning with the collection, integration, standardization, and enrichment of disparate data sources from health plans and provider organizations, we put this data to use through the application of advanced tools and analytic methodologies, comprehensive measures production, and standard and customized reporting. Our end goal: to provide our clients with a robust resource that they can be confident using to inform policy and decision making.

With an increasing need to put sensitive and actionable information into the hands of key stakeholders to help guide care management and improvement, Onpoint has developed a new reporting solution that offers dynamic, detailed views into the cost, quality, and utilization of healthcare services for a diverse set of selected populations.

Introducing the Onpoint Performance Reporting Portal (PRP), an innovative measurement and reporting tool that delivers personalized views into the health and performance of provider organizations’ targeted populations.

A secure, online application, Onpoint PRP offers role-based user interfaces to view summary-level reporting across carefully curated sets of measures that have been enriched by comparative benchmarks and actionable filters. Core functionality allows users to quickly customize dashboard visualizations, drill down into a suite of sophisticated analyses, and manage all relevant inputs to client-specific master provider directories. The end result is a data set that most accurately reflects the quality and affordability of care being provided to patients in a given region.

Using role-based credentialing, practice administrators, practice facilitators, and practitioners alike can leverage Onpoint PRP for several purposes – from comparing their organization’s performance to statewide and national benchmarks to identifying variations in care within and across their associated organizations.

In the sections that follow, key components, features, functionality, and recommended end-user workflows of Onpoint PRP will be explored in greater detail. For more information on the underlying methods and measures used in generating client-specific analyses displayed throughout the portal, see the directory of client-specific reference materials located in the main menu’s Documentation component, or reach out to the client administrator for more information. For questions about Onpoint PRP – its architecture, purpose, and/or use – please reach out to Onpoint’s support team (prp-support@onpointhealthdata.org).
Exploring Onpoint PRP

Onpoint PRP was built to meet a critical need of our clients. Through intensive collaboration with leaders in the healthcare industry – from federal, state, and private agencies to provider organizations and health plans – the platform has been flexibly designed to help fill crucial information gaps and to address the need for greater transparency in the cost, quality, and utilization of services delivered across healthcare settings through a dynamic interface. Onpoint PRP both tells the story of an organization’s health and performance and allows that story to be “rewritten” with validated information from users with “on-the-ground” knowledge.

At a high-level, there are seven core components that structure the Onpoint PRP framework, each of which are explored in greater detail in this document’s following sections:

1. **Dashboard** – Designed with a widget-based architecture to present concise and convenient analyses that allow users to quickly interpret and verify their performance

2. **Measurement** – Dynamic tabular presentations that facilitate users’ review and exploration of summary measure results

3. **Master Provider Directory** – Centralized, authoritative repository of provider organization and practitioner attributes that enable users to update, validate, and attest the accuracy of their information on a regular basis

4. **Reporting** – Libraries of preconfigured and user-customized reports outfitted with actionable filters and the ability to toggle between both tabular and graphical presentations of defined data visualizations

5. **User Management** – Administrative controls that permit privileged users to administer and manage their organization’s directory of associated users

6. **Documentation** – Application- and client-specific supporting documentation and reference materials that assist users in their operation and understanding of Onpoint PRP’s key features and functionalities

7. **Help & Support** – Information pertaining to the client and/or program operating Onpoint PRP, including contact information and a system to enter support requests
Dashboard

Onpoint PRP’s dashboard component is a data visualization tool that displays the status of an organization’s key metrics and performance indicators for the current reporting period. The dashboard’s graphics empower users to monitor correlations, trends, outliers, patterns, and business conditions at a glance. Whether users choose to consume information from a preconfigured display or from one that they have customized themselves, the tool’s widget-based architecture enables dynamic interactivity through hover and filtering functionality. For an overview of key features included in the dashboard component, see Figure 1.

Figure 1. Example of a Configured Dashboard

Receiving Default Dashboards

Upon logging in to Onpoint PRP for the first time, each user will be presented with a default dashboard tailored specifically for their user type and role by the client administrator. This default dashboard includes data visualizations that offer information defined and packaged by the client to help users easily monitor metrics pertaining to program goals and objectives.

Should the client administrator wish to update their default dashboards when more current information becomes available, program goals and/or objectives change, or Onpoint PRP’s dashboard component functionality is updated, users will automatically receive revised default
dashboards, either overwriting previous models or as alternative versions. Such changes will be reflected in the dashboard’s title and can be managed or adjusted using the dashboard settings control. For more information on how to manage dashboard settings, see Managing Dashboards.

**Using & Navigating Widgets**

Onpoint PRP’s dashboard displays are architected with a widget-based design. A widget is an application created to capture a limited, albeit targeted, set of key materials for quick consumption. These snapshots of information are dynamic by design, with settings that allow users to edit and/or remove their content, re-prioritize their placement on the dashboard, and hover over their features to learn more via pop-up previews. It is the widgets’ customizable nature that facilitates the creation of personalized views of insights into the health and performance of a user’s organization.

Onpoint PRP’s dashboard visualization tool offers three primary types of widgets:

1. **Reporting Period Overview** – This widget provides key information on the demographics and reported organizational attribution of the user’s self-reporting level for the current reporting period — and, when applicable, the previous reporting period for trending purposes.

2. **Demographics** – This widget provides comparative information on the demographics of the user’s self-reporting level, each of the user’s additional reporting-level associations, and the state as a whole (or some additional higher-level aggregation).

3. **Measurement Bundles** – This widget provides comparative information on the results of domain-related measures for the user’s self-reporting level between the current and previous reporting periods. Domains defined by clients in the generation of measurement bundles may include:
   - **Healthcare Performance** – Measures generated specifically to provide critical information related to the cost, quality, and utilization of services delivered across healthcare settings
   - **Healthcare Policies & Initiatives** – Measures generated specifically to support and proactively monitor key areas of performance of particular interest by critical healthcare transformation efforts

   Measurement bundle examples in this domain may focus on the Comprehensive Primary Care Plus (CPC+) initiative, the Medicare Access and CHIP Reauthorization Act (MACRA), or the Accountable Care Organization Shared Savings Program among others.
– **Health Conditions & Diseases** – Measures generated specifically to help evaluate and better understand various health conditions and diseases

*Measurement bundle examples in this domain may focus on asthma, diabetes, heart disease, and other acute and chronic health conditions and diseases.*

– **Pediatric Subspecialty Performance** – Measures generated specifically to assess an organization’s pediatric patient population

For an overview of core features and functionality of the various widgets that can be found in a dashboard, see **Figure 2**, which uses the *Pediatric Measures* widget as an example.

**Figure 2. Example of a Configured Widget**

Key features contained in a widget include:

1. **Widget Title** – All preconfigured widgets have established, non-editable titles; customizable widgets have titles that can be edited and revised according to a user’s preferences.

2. **Widget Relocation** – To relocate a widget on the grid-structured dashboard, users must first click and hold on to the ‡ button located in the upper-left-hand corner of the selected widget (Step 1). Next, simply drag the widget to the desired area on the dashboard (Step 2) and drop it into place by releasing the hold on the ‡ button (Step 3).
**Step 1** – Click and hold on to the button located in the upper-left-hand corner of the Pediatric Measures widget. Prepare to relocate the widget to the current location of the CCO Incentive widget.

**Step 2** – While holding on to the button, drag the widget to its new location.
Step 3 – Once the widget has snapped into its new position on the dashboard, simply release the button.

3. **Widget Settings** – In the upper right-hand corner of each widget, there is a settings icon/button: 🍊. Clicking on the icon will activate the widget to enable viewing and customization of its content. By design and unlike custom widgets, all **preconfigured** widgets do not have any customizable settings. For more information on how to modify a customizable widget, see Adding Widgets to an Existing Dashboard. For both preconfigured and customizable widgets, users can delete a widget from their dashboard simply by clicking the ✗ Remove Widget button located in the lower left-hand corner of the widget’s settings panel. Once all adjustments to a widget’s settings have been made, users must click the ✅ Done button located in the lower right-hand corner of the panel to confirm and implement all changes (Step 1).
Step 1. Click on the settings button located in the upper right-hand corner of the widget. By design, all preconfigured widgets do not have any customizable settings enabled for users’ control. Once all adjustments to the widget’s settings have been completed, click the ✔ Done button located in the lower right-hand corner to confirm and implement all changes.

4. Hover Pop-ups – For field titles, measure results, and other information displayed in a widget that may not be intuitive by nature, users can hover over specific areas to reveal pop-ups that provide additional descriptions and explanations (Step 1). Some pop-ups may also provide links that redirect users to more-robust supporting documentation.

Step 1. Hover over select areas of a widget’s content to reveal pop-up previews displaying additional information about the areas of interest.
**Adding Widgets to an Existing Dashboard**

While default dashboards may be designed initially by the client administrator using a certain set of preconfigured widgets, the default display can still be customized by users. Most simply, any preconfigured widget can be removed from a default dashboard using the \( \times \) Remove Widget button located in the unwanted widget’s settings panel. For more information on how to remove widgets from a dashboard, see the section above on **Widget Settings**. Alternatively, new widgets – from a library of either preconfigured or customizable types – can be added to a user’s default dashboard using the **Dashboard Settings** control located in the upper right-hand corner of the component’s banner (Step 1).

**Step 1. Click on the Dashboard Settings control located in the upper right-hand corner of the dashboard’s banner.**

![Dashboard Settings Control](image)

Clicking on the **Dashboard Settings** control will present users with a variety of options to consider, the first of which allows users to **Add Widget** (Step 2). Selecting this menu item will prompt users to add a new widget to their current dashboard with options of either “preconfigured” (Step 2a) or “customizable” (Step 2b) widgets:

1. **Preconfigured Widgets** – Widgets containing predefined content by the client administrator are not editable by other users. For more information on preconfigured widgets offered to users, see **Using & Navigating Widgets**.

2. **Customizable Widgets** – Widgets providing a visualization framework (i.e., a template) that allows users to tailor the content displayed according to their preferences. Widgets that offer user customization include:
   - **Preconfigured Measurement Bundles** – This widget allows user to select a number of domain-related measures (e.g., healthcare performance, healthcare policies and initiatives, health conditions and diseases, pediatric subspecialty performance, etc.) for comparison of results within the user’s self-reporting level and between reporting periods.
– **Custom Measurement Bundles** – This widget allows use to select any combination of measures to group and view in a single view for comparison of results within the user’s self-reporting level and between reporting periods.

**Step 2. From the Dashboard Settings control, select the Add Widget option.**

**Step 2a. Identify the preconfigured widget to be added to the default dashboard.**
Step 2b. Identify the customizable widget to be added to the default dashboard.

For users who decide to create and customize a new Custom Measurement Bundle widget by clicking on the button located in the lower right-hand corner of the Add Widget window, they will return to their dashboard with a new Custom Measurement Bundle widget populated in the first available position of their display. The widget will be blank, but will instruct the user to begin tailoring its content by clicking on the Customize Widget button below (Step 3).

Step 3. Select a Custom Measurement Bundle widget from the Add Widget control panel to populate the widget in the default dashboard; click on the button to begin tailoring the widget’s content.

Users next will be given the option to select the set of Measures to Display in the new Custom Measurement Bundle widget as well as the opportunity to assign a title that most accurately
reflects the purpose of its defined content. The measurement selection option includes a dynamic drop-down/auto-text menu, where users can either click directly in the field to select desired measures from a menu or begin typing to narrow their search to only a subset of requested measures; the title selection option, on the other hand, is a free-form entry field that allows users to personalize their widget’s title with a name of their choosing. After configuring the new widget, click the ✔ Done button located in the lower right-hand corner of the widget’s settings panel to confirm and implement all changes (Step 4). Doing so will rotate the widget back to its visualization presentation, which will now display the user’s newly tailored content. For more information on how to modify an existing widget’s settings, see Using & Navigating Widgets.

Step 4. Tailor the widget’s content by giving the widget a title and selecting a set of measures to display; click on the Done button to confirm and implement all changes.

Before leaving a modified default dashboard, users must always remember to save changes using the ☑️ Save Changes button located in the component’s banner. For changes made to a default dashboard, the portal will allow users only to “Save as” changes by creating a new dashboard. Default dashboards cannot be overwritten by users in an effort to maintain the integrity of client-administered dashboards.
Creating a New Dashboard

Just as users can modify existing default dashboards by adding and removing widgets to the displays, Onpoint PRP’s dashboard visualization tool also allows users to build displays entirely from scratch to best meet their needs. Using the Dashboard Settings control located in the component’s banner, users can select the menu option to Create Dashboard (Step 1). Doing so will redirect users to a window that provides instructions on how to begin designing their new displays (Step 2).

Step 1. From the Dashboard Settings control, select the Create Dashboard option.

Step 2. Users next will be redirected to a window instructing them on how to customize their new dashboard display.

Clicking on the Customize Dashboard button located in the Create Dashboard window will bring users to a familiar pop-up window to begin selecting either preconfigured or customizable widgets to populate their new display. For more information on widgets and how to add them to a dashboard, see Adding Widgets to an Existing Dashboard.
Note that only a single widget type may be added to a dashboard at a given time. After the first widget is selected using the Create Dashboard option, users must select the Add Widget option from the Dashboard Settings control each time they wish to insert a new widget to their display.

Once configured, users must remember to save changes to their new dashboards using the Save Changes button located in the component’s banner. The first time that a user saves their new dashboard, they will be provided with a pop-up to name their new display. Any adjustments or modifications to the dashboard thereafter will require only a quick “Save” action, which will overwrite previous displays with the user’s current revisions. By design, the most recently saved dashboard will be the default dashboard when the user next logs in.

Managing Dashboards

After using Onpoint PRP consistently over time, it is not uncommon for a user to amass several dashboards from which to choose – views prepared and updated by client administrators, existing views modified by the user, and entirely new views designed and defined by users and their organizations. To administer and review all of these updates, modifications, and creations, Onpoint PRP allows users to manage their set of dashboards through two primary approaches: toggle management and administrative management:

1. **Toggle Management** – By selecting the Dashboard Settings control in the upper right-hand corner of the component’s banner, users can view a list of all dashboards available for their use in the drop-down menu. Differentiating between those dashboards that are provided automatically by the client administrator (i.e., Default Dashboards) and those that have either been modified or created by the user themselves (i.e., Customized Dashboards), users can toggle to any of the available options to immediately render the visualizations of the selected displays (Step 1).

   **Step 1.** Toggle among the various dashboards available for use and select one from the drop-down menu to view it.
2. **Administrative Management** – By selecting the same *Dashboard Settings* control, users will see the option to *Manage Dashboards*. By clicking on this option, users are provided with an administrative function that allows them to view a comprehensive list of all user-customized dashboards, with details on when each dashboard was created and last updated *(Step 2)*. This screen also gives users the option to *Delete* each customized dashboard from their individual collection. Deleting a customized dashboard will result in its permanent removal from the user’s system.

**Step 2. Administer customized dashboards, including removing customized dashboards.**

<table>
<thead>
<tr>
<th>Name</th>
<th>Created</th>
<th>Updated</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Dashboard Display</td>
<td>7/31/2017</td>
<td>7/31/2017</td>
<td>Delete</td>
</tr>
<tr>
<td>August 2017 Priorities</td>
<td>8/2/2017</td>
<td>8/3/2017</td>
<td>Delete</td>
</tr>
<tr>
<td>IPRP Provider Organization Efforts</td>
<td>1/1/2016</td>
<td>1/10/2016</td>
<td>Delete</td>
</tr>
</tbody>
</table>
Measurement

Onpoint PRP’s measurement component offers users a role-based interface to view summary-level reporting across carefully curated sets of measures that have been enriched by relevant benchmarks, actionable filters, dynamic drill-down capabilities, and responsive feedback mechanisms. This style of reporting seeks to provide greater transparency into measurement calculations — both to inspire the user’s continuous engagement and to solicit their feedback to help inform ongoing reporting efforts. These reports encourage users to compare their performance to benchmarks, assess variations in care, and implement systems for improving healthcare quality.

Viewing Self-Reporting-Level Measure Results

Users of Onpoint PRP can view their self-reporting level’s summary measure results. For example, a practice administrator can view their organization’s summary measure results, a medical group administrator can view their organization’s summary measure results, etc.

The exception to this rule for the Care Transformation Collaborative of Rhode Island’s PRP solution is that practitioners will not be able to view their own individual measure results; instead, practitioners will be able to view only summary measure results for the practice organization to which they are attributed for reporting purposes in the portal. For formal definitions of reporting levels, see Table 1.

Table 1. Definitions of Reporting Levels

<table>
<thead>
<tr>
<th>Reporting Level Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self</td>
<td>Summary-level measure results for the user type’s own setting; all user types have access to this level of reporting.</td>
</tr>
<tr>
<td></td>
<td>Example: As a practice administrator, I can view my summary-level measure results for my own organization.</td>
</tr>
</tbody>
</table>

To begin exploring their self-reporting level’s measure results, users first must select the Measures component from the portal’s main menu options (Step 1).
Step 1. Select the Measures component from the portal’s main menu options.

Selecting the Measures component will bring users to a dynamic table that displays the most recent reported results of key metrics and performance indicators for the user’s self-reporting level. For an overview of some of the core features and functionality of the self-reporting level’s measurement table, see Figure 3.

**Figure 3. Example of a Self-Reporting Level’s Measurement Component**

<table>
<thead>
<tr>
<th>Measure</th>
<th>Description</th>
<th>Result</th>
<th>Benchmark #1</th>
<th>Benchmark #2</th>
<th>Benchmark #3</th>
<th>Denominator</th>
</tr>
</thead>
<tbody>
<tr>
<td>URI</td>
<td>Appropriate Treatment for Children With Upper Respiratory Infection (ages 3 months - 16 years)</td>
<td>96%</td>
<td>90%</td>
<td>99%</td>
<td>95%</td>
<td>1179</td>
</tr>
<tr>
<td>AAB</td>
<td>Avoidance of Antibiotic Treatment in Adults With Acute Bronchitis (ages 18-64)</td>
<td>100%</td>
<td>37%</td>
<td>60%</td>
<td>37%</td>
<td>1</td>
</tr>
<tr>
<td>CDC-NPH</td>
<td>Comprehensive Diabetes Care - Medical Attention for Nephrology (ages 18-75)</td>
<td>63%</td>
<td>70%</td>
<td>68%</td>
<td>94%</td>
<td>32</td>
</tr>
<tr>
<td>CDC-EYE</td>
<td>Comprehensive Diabetes Care - Eye Exam Performed (ages 18-75)</td>
<td>44%</td>
<td>45%</td>
<td>62%</td>
<td>70%</td>
<td>32</td>
</tr>
</tbody>
</table>

Key features contained in the measurement component include:

1. **Measurement Navigation** – Wherever a user travels in the measurement tables, they will always be able to find their way back to the beginning of their searches – or anywhere in between – by using the hyperlinked “breadcrumb” navigation trail located in the component’s banner. By identifying then clicking on a particular unit of the navigation, users will find themselves automatically redirected to the window of interest.

2. **Measurement Options** – Throughout Onpoint PRP, users have the opportunity to export a variety of windows’ data displays to a comma-separated values (CSV) file. When viewing summary measure results, clicking on the Options button in the component’s banner will produce a drop-down menu that allows users to convert the on-screen data into a CSV file that can be downloaded and manipulated by the user.

3. **Measurement Filters** – Sometimes, the summary measurement tables may not be calibrated to provide the precise information for which users are searching. If the
tabular presentation contains either too much or too little content, filters can be used to help expand or narrow the underlying data set, effectively allowing users to view only the information that they want. Across all measurement tables in the portal, there are three primary filtering options available to users:

- **Reporting Period** – This filter allows users to toggle between measure results that have been calculated for different periods of time (when multiple reporting periods are available). Each reporting period captures a different amount of enrollment and claims data, designated by a client-defined span of incurred dates of service and/or paid claim dates, and are often presented in calendar-year or rolling-year durations. With each data refresh, a new reporting period will be added to the portal’s filtering options of reporting periods to enable trend analysis.

- **Measure Name / Code** – This filter is an auto-text entry field that allows users to narrow their search of measure results by typing in the desired measure – either by its code, its name, or a key word in its title or description.

- **Product** – This filter allows users to redefine the measure set’s specifications by refining each measure’s denominator to examine only a specific product type – commercial, Medicaid, or Medicare patient populations. For example, choosing the Medicaid product type as a filter will recalculate the measurement table’s results using only the user’s Medicaid patient population as the basis for each denominator’s computation. Note that each client defines product types differently for the portal’s purposes and not all product types may be available depending upon participating payers and/or client specifications.

4. **Measurement Table** – Onpoint PRP’s measurement display encourages users to compare their performance indicators both against key benchmarks and across time. From the component’s landing page, all users have access to a measurement table that provides a view of their self-reporting level’s summary measure results. Fields contained in this display include the following:

- **Measure** – This field provides each measure’s abbreviated name (e.g., “BCS” for “Breast Cancer Screening,” “CDC-EYE” for “Comprehensive Diabetes Care – Eye Exam Performed,” etc.).

- **Description** – This field provides a concatenated string of each measure’s full name, age band, and component. See Figure 4 for an example of a concatenated measure name.
Figure 4. Example of a Concatenated Measure Name

- **Result** – This field provides the calculated measure result for the user’s defined reporting level (e.g., the summary measure results for an individual practitioner).

- **Benchmark Metric(s)** – These columns provide an opportunity for clients to import specific benchmarks that are relevant for their users when comparing their performance.

- **Denominator** – This field provides a count of the subset of the patient population included in the selected performance measure’s results.

5. **Hover Pop-ups** – In many cases, users can hover over field titles, measure results, and other information displayed in a measurement table to reveal pop-ups with additional descriptions and detail (Step 1). For some pop-ups, links are provided to redirect users to more robust supporting documentation.

**Step 1. Hover over a measurement table’s content to reveal pop-up previews displaying additional information about the selected areas.**

Viewing Additional Reporting-Level Measure Results

For users of Onpoint PRP who have access to additional reporting-level associations other than the universal self level, the portal offers the chance to view summary measure results for each additional associated type of reporting level.

For example, a medical group administrator can view their self-reporting level’s summary measure results and their organization reporting level’s summary measure results (i.e., the
summary measure results of each of their medical group’s attributed practices). For a comprehensive set of formal definitions on the different types of reporting levels, see Table 2.

Table 2. Definitions of Reporting Levels

<table>
<thead>
<tr>
<th>Reporting Level Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Self                 | Summary-level measure results for the user type’s own setting; all user types have access to this level of reporting.  
  Example: As a medical group administrator, I can view summary-level measure results for my own organization. |
| Organization         | Summary-level measure results for each of the user type’s attributed organizations.  
  Example: As a medical group administrator, I can view summary-level measure results for each my organization’s attributed practices. |

To illustrate the core features and functionality of the measurement component for user types that have access to additional reporting levels other than the universal self relationship, the medical group user type will be used as a case study.

The medical group user type has access to summary-level measurement information for all practice organizations that are attributed to their medical group organization in the portal. Accordingly, all related summary-level measurement tables for the medical group’s affiliated practice organizations exist in the portal’s Organizations component. Select this component from the portal’s main menu (Step 1).

**Step 1. Select the Organizations measurement component from the portal’s main menu.**
From the component’s landing page, medical group users have access to a view of each of their organization’s attributed practices. Fields contained in this display include:

- **ID** – This field provides the Onpoint-assigned identifier that represents a unique organization.
- **Name** – This field provides the full name of the organization.
- **City** – The field provides the city of the organization’s physical location.
- **Type** – This field identifies the setting type (e.g., Cohort, Medical Group, Practice) of the organization.

From this view of attributed practices, users can explore details of a particular practice by clicking on a single practice’s row in the table (Step 2).

**Step 2. Select an individual practice from the medical group’s roster of attributed organizations.**

<table>
<thead>
<tr>
<th>Affiliated Practices</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
</tr>
<tr>
<td>34</td>
</tr>
<tr>
<td>35</td>
</tr>
</tbody>
</table>

Doing so will bring users to a screen with several panels (akin to tabs) that contain distinct information pertaining to the selected practice (Step 3).

**Step 3. Review the individual practice’s display of several panels that contain distinct information pertaining to its organization.**

Panels contained in this display include:
• **About** – This panel provides an overview of the selected organization, including its registered name, type of setting, and contact information such as phone number and mailing address. For more information on how to edit an organization’s information, see the section on [Editing Existing Organizations](#).

• **Measures** – This panel contains a measurement table that provides a view of the selected organization’s summary measure results. Similar to the functionality found in other measurement tables, users can hover, filter, export, and drill down. Fields provided in this display include measure name, measure description, measure result, benchmark metrics, and denominator. For more information, see the section on [Measurement Table](#).

• **Providers** – This panel contains the selected organization’s reported population of practitioners. Fields provided in this display include the practitioner’s National Provider Identifier (NPI), first and last names, and primary specialty.

For a medical group user who wishes to learn more about a particular practitioner with reported organizational attribution to one of the medical group’s associated practices, they can click on the selected practitioner’s row from the practice’s “Providers” panel (Step 4).

**Step 4. Select an individual practitioner from the practice’s roster of practitioners with reported organizational attribution.**

![Practitioner Information Panel](image)

Doing so will bring users to a display with another set of panels, this time containing distinct information pertaining to the selected practitioner (Step 5). Note: For users (e.g., the practice user type) with a main menu measurement component titled, “Providers,” this view of practitioner information aligns with the component’s landing page.
Step 5. Review the individual practitioner’s display of several panels containing information pertaining to the selected practitioner.

Panels contained in this display include:

- **About** – This panel provides an overview of the selected practitioner, including their full name, professional credential(s), date of birth, specialties, NPI, and contact information. For more information on how to edit a practitioner’s information, see the section on Editing Existing Practitioners.

- **Affiliated Orgs** - This panel contains information pertaining to the practitioner’s affiliated organizational attributions – the potentially one-to-many relationships that the individual practitioner may have with practice organizations during a single reporting period. Fields contained in this display include the full name of the organization(s) at which the practitioner practiced over time and the practitioner’s effective and termination dates at each. For more information on affiliated organizational attribution, see the section on Managing Practitioners’ Affiliated Organizational Attributions.

- **Reported Orgs** – This panel contains information pertaining to the practitioner’s reported organizational attributions; that is, the one-to-one relationship between the practitioner and one of their potentially many affiliated organizational attributions indicating the practice organization within which the practitioner has been reported in
the portal for a single reporting period. (The PRP currently does not allow a practitioner to have results displayed for multiple practices during a single reporting period and therefore assigns them to a single practice even when they may have multiple affiliations.) Fields contained in this display include each reporting period displayed in the portal and a crosswalk to the single practice organization with which the practitioner is reported in the portal. For more information on reported organizational attribution, see the section on Managing Practitioners’ Affiliated Organizational Attributions.
Master Provider Directory

Onpoint PRP’s master provider directory component is a centralized repository of provider organization and practitioner attributes. As relationships among healthcare providers become increasingly more complex, keeping track of their expanding and changing networks can be challenging. Onpoint PRP overcomes this difficulty by providing users with access to a single, transparent shared master repository of key provider information for their use, review, and management. Onpoint PRP’s master provider directory is a way of breaking through the silos of isolated provider information to encourage and facilitate users’ ability to update, validate, and attest to the accuracy of their information on a routine basis.

Editing Existing Primary Care Practitioners

One of the many features of the master provider directory component is that it allows users with appropriate permissions to edit the information of individual practitioners within the client’s repository. From any display panel for a selected practitioner, authorized users can open a form to edit and update the selected practitioner’s information by clicking on the Edit button located in the component’s banner (Step 1).

Step 1. Select an individual practitioner from a Providers display and click on the Edit button located in the component’s banner.
Doing so will automatically present users with editable fields for the selected practitioner’s detailed information, as displayed in their About panel (Step 2).

**Step 2. Review the contents in the editable page detailing the selected practitioner’s information.**

![PRP Practice Location #2 > Providers > Francois Schmidt > Change Information](image)

This editable version of an individual practitioner’s record in the master provider directory allows users to verify, update, enrich, and standardize the practitioner’s information to create a source of truth so that downstream data processes and measures calculations are increasingly accurate and consistent. Any revisions made to an individual practitioner’s record are immediately updated in the directory and reflected throughout the portal. Concurrently, the client administrator can audit all modifications made to the directory and follow up separately with the user if necessary. To edit a practitioner’s record, users simply select any field in the form and make the needed modifications. After making any necessary adjustments, users must select the Submit Changes button located in the lower left-hand corner of the directory to confirm and implement all changes (Step 3).
Step 3. Click in any field to begin making modifications to the practitioner’s master record. Click on the Submit Changes button to confirm and implement all changes.

Doing so will return users to the practitioner’s About landing page, with the freshly made alterations in place (Step 4).

Step 4. Review all alterations made to the selected practitioner’s master record.

Sections contained in the display of an individual practitioner’s master record include:

- **Name** – This section includes fields containing the first, middle, and last names of the selected practitioner.

- **Identifiers** – This section includes fields containing the set of unique identifiers belonging to the selected practitioner, such as their National Provider Identifier (NPI),
Drug Enforcement Administration (DEA) number, and Unique Physician Identification Number (UPIN).

- **Contact Information** – This section includes fields containing the contact information of the selected practitioner, such as their phone number, email address, and primary practice’s mailing address.

- **Specialties & Credentials** – This section includes fields containing the primary and secondary specialties and professional credential (e.g., MD, NP, DO, PA, ND, etc.) of the selected practitioner.

**Adding New Practitioners**

For those users who have permissions to add new practitioner records to the client’s master provider directory, the option to do so is provided with each practitioner display previously discussed in this document. From any given display of an organization’s reported population of practitioners, users can open a form to formally request the addition of a new practitioner record by clicking on the ↓ Options button in the component’s banner and selecting the Add Provider item from the drop-down menu (Step 1).

**Step 1. From the display of an organization’s reported population of practitioners, click on the Add Provider item from the Options drop-down menu located in the component’s banner.**

Doing so will automatically redirect users to a window where they will be instructed to enter the 10-digit NPI value of the requested practitioner into the platform’s NPI-lookup database (Step 2).

**Step 2. Enter the 10-digit NPI value of the requested practitioner into the platform’s NPI-lookup database to identify whether a record exists for the practitioner in the directory.**
If the NPI value entered by the user into the lookup database corresponds to an existing practitioner record within the client’s master provider directory, the platform will indicate the “matching provider” and provide a summary of their information for the user’s review. Should the user have reason to believe that the identified practitioner should in fact be reported in the portal by another practice for the reporting period, they can add a new affiliation for the practitioner by selecting the Add Affiliation button located in the lower left-hand corner of the Add Provider window (Step 2a). For more information on affiliated organizational attribution and how to add associations, see the section on Managing Practitioners’ Affiliated Organizational Attributions.

**Step 2a. If a record corresponding to the entered NPI value exists in the client’s master provider directory, the platform will reveal the “Matching Provider.”**

If, on the other hand, the NPI value entered by the user does not correspond to an existing practitioner record within the client’s master provider directory, the platform will indicate that no records currently correspond to the requested practitioner’s NPI value and will offer the option to create a new record for the requested practitioner. To do so, simply click on the Add Provider button located in the lower left-hand corner of the Add Provider window (Step 2b).
Step 2b. If no records correspond to the NPI value, the platform will provide the option to add the new practitioner to the repository.

Doing so will bring users to a page where they can enter the individual practitioner’s new record into the client’s master provider directory. This form, which is blank with the exception of the prepopulated NPI value as the record’s primary input, allows users to supplement the record with the practitioner’s full set of attributes, with required fields marked with an asterisk (Step 3). For more information on how to enrich and edit an individual practitioner’s record in the master provider directory, see the section on Editing Existing Practitioners.

Step 3. Supplement the new practitioner’s master record by entering their individual attributes.

Once users have completed filling out the new practitioner’s record, they must select the Create Provider button located in the lower left-hand corner of the form to confirm and implement their additions.
All new practitioner master records are immediately updated in the directory and reflected throughout the portal. The client administrator can audit all modifications to the directory and follow up with the user if necessary. (Note: Since a newly entered practitioner has not yet been considered in Onpoint’s attribution processes for any reporting period, only their About panel will be populated.) Prior to the portal’s next scheduled refresh, Onpoint will consider all newly added practitioners to the client’s master provider directory in its attribution processes to identify whether any patients are attributed to them in the submitted enrollment and claims data.

Managing Practitioners’ Affiliated Organizational Attributions

Onpoint PRP’s master provider directory component makes a distinct difference between “affiliated” organizational attribution and “reported” organizational attribution. Whereas affiliated organizational attribution refers to the potentially one-to-many relationships that an individual practitioner may have with practice organizations during a single reporting period, reported organizational attribution refers to the one-to-one relationship between a practitioner and one of their potentially many affiliated organizational attributions during a single reporting period, ultimately indicating the practice organization to which the practitioner is assigned for reporting purposes in the portal.

Within an individual practitioner’s Affiliated Orgs panel is information pertaining to each of the organizations at which the practitioner practiced over time, including the names of those practices and the practitioner’s effective start and termination dates at each. Additionally, within an individual practitioner’s Reported Orgs panel is information pertaining to the single organization to which the practitioner is assigned per reporting period.

For users who wish to add or update an existing affiliated organizational attribution for an individual practitioner (and therefore modify the practitioner’s reported organizational attribution during certain reporting period(s)), they can do so in a couple of ways:

- **Add Affiliation** – Users can add a practice association to an individual practitioner’s list of affiliated organizational attributions by selecting the Add Affiliated Organization item from the Options drop-down menu located in banner of the practitioner’s Affiliated Orgs panel (Step 1).
Step 1. Select the Add Affiliated Organization item from the Options drop-down menu.

Doing so will bring users to a window where they can fill in the details to identify an additional organizational affiliation for the selected practitioner. Fields contained in this display include a drop-down menu of practice organizations to select from based on the user’s reporting-level access, options to designate the practitioner’s effective and termination dates with the selected organization, and a checkbox to indicate whether the selected organization is the practitioner’s primary practice location and therefore should be considered as the practitioner’s reported organizational attribution for the selected reporting period(s). Once users have completed filling out the practitioner’s new association, they must select the Add Affiliation button located in the lower left-hand corner of the form to confirm and implement their additions (Step 2).
**Step 2.** Complete the form to add an affiliated organizational attribution for the selected practitioner.

![Image of the form](image)

A few scenarios in which users may decide to use this feature and the outcomes of those actions are outlined below:

- **Scenario #1** – Practitioner A is reported by Practice 1 in the portal for a particular reporting period. However, a user knows that Practitioner A also served at Practice 2 at some point during that same period of time before they joined Practice 1. Practitioner A therefore served with both Practice 1 and Practice 2 during the same reporting period, although their effective and termination dates at each practice do not overlap.

Since Onpoint PRP’s attribution logic requires a one-to-one reporting relationship between practitioners and practices, Practitioner A is assigned only to Practice 1 in the portal. However, the user believes that Practitioner A’s reporting relationship for the reporting period in question should instead be with Practice 2.

» **Action** – The user adds Practice 2 as one of Practitioner A’s affiliated organizations for the reporting period in question and marks that affiliation as Practitioner A’s primary practice location.

» **Outcome** – The user’s request will be processed and considered in Onpoint’s subsequent application of practitioner-to-organization attribution tie-breaker logic. This logic will select the primary practice location as either Practice 1 or Practice 2 for Practitioner A during the reporting period in question by
choosing the affiliated organization to which Practitioner A belonged at the end of the reporting period.

The outcome of the tie-breaker logic on Practitioner A’s reported organizational attribution for the reporting period in question will be applied in the portal’s next scheduled refresh.

– **Scenario #2** – Practitioner A is reported by Practice 1 in the portal for a particular reporting period. However, a user knows that Practitioner A also served concurrently at Practice 2 during the same period of time. Practitioner A therefore served with both Practice 1 and Practice 2 during the same reporting period, and their effective and termination dates at each practice do overlap.

Since Onpoint PRP’s attribution logic requires a one-to-one reporting relationship between practitioners and practices, Practitioner A is assigned only to Practice 1 in the portal. However, the user believes that Practitioner A’s reporting relationship for the reporting period in question should instead be with Practice 2.

» **Action** – The user adds Practice 2 as one of Practitioner A’s affiliated organizations during the reporting period in question and marks that affiliation as Practitioner A’s primary practice location.

» **Outcome** – The user’s request will be processed and considered in Onpoint’s subsequent application of practitioner-to-organization attribution tie-breaker logic. This logic includes the following steps:

- Identify whether one of Practitioner A’s affiliated practices during the reporting period in question is marked as their primary practice location.

  If either Practice 1 or Practice 2 is marked as such, Practitioner A will be attributed to that organization as primary for the reporting period in question.

- If both or neither of Practitioner A’s affiliated practices are marked as their primary practice location, then tie-breaker logic will select Practitioner A’s reported organizational attribution for the relevant reporting period by choosing the practice that Practitioner A joined most recently.

- If Practitioner A joined Practice 1 and Practice 2 at the same time, and therefore the logic results in another tie, Practitioner A will be attributed to the practice whose name comes first in alphabetical order from A to Z.
The outcome of the tie-breaker logic on Practitioner A’s reported organizational attribution for the reporting period in question will be applied in the portal’s next scheduled refresh.

- **Update Affiliation** – Within an individual practitioner’s Affiliated Orgs panel, users can update a practitioner’s existing affiliated organizational attributions by clicking anywhere on one of their affiliated organization rows (Step 1). Doing so will bring users to a window similar to the one used for adding affiliations (see above). The form, which is prepopulated with information pertaining to the selected organization’s relationship with the practitioner, includes the name of the selected organization and offers options to revise the practitioner’s effective and termination dates with the selected organization as well as a checkbox to indicate whether the selected organization is the practitioner’s primary practice location and should therefore be considered as the practitioner’s affiliated organization for the reporting period(s) in question. Once users have completed updating the practitioner’s association, they must select the update affiliation button located in the lower left-hand corner of the form to confirm and implement their changes.

**Step 1. To update a practitioner’s affiliated organizational attribution, click anywhere on one of their affiliated organization rows in the Affiliated Orgs panel.**

![Affiliated Orgs Form](image)

**Editing Existing Organizations**

Just as Onpoint PRP’s master provider directory component provides users with the opportunity to verify the accuracy of individual practitioner attributes, it allows authorized users to also manage individual organization attributes. By selecting the Organization Settings component from the portal’s main menu options (Step 1), users will be presented with a form to formally manage their organization’s information.
Step 1. **Select the Organization Settings (in the example below, the Medical Group Settings) component from the portal’s main menu options.**

This individual organization’s record in the master provider directory allows users to verify, update, enrich, and standardize the organization’s information to create a source of truth so that downstream data processes and presentations are increasingly accurate and consistent. Any revisions made by users to an individual organization’s master record are immediately updated in the directory and reflected throughout the portal. Concurrently, the client administrator will audit all modifications made to the directory and follow up separately with the user as needed.

To manage an organization’s master record, users can simply select any field in the form and begin making modifications by overwriting exiting details. Fields in this dynamic form include the organization’s address and the user’s own contact information. After making all necessary adjustments, users must select the **Submit Changes** button located in the lower left-hand corner of the page to confirm and implement all changes (Step 2). Doing so will indicate that the organization’s information was “successfully updated;” the organization’s About panel will now reflect the newly made alterations. (Note: Users with access to multiple organizations and/or multiple user types with Onpoint PRP must log in separately as each individual user type and follow the above instructions to update each of their organization’s master record.)

**Step 2. Click in any field to begin making modifications to the organization’s master record. Click on the Submit Changes button to confirm and implement all changes.**
Creating New Organizations

Onpoint PRP’s master provider directory functionality does not allow end users to create new provider organizations for the directory’s consideration. If users believe that a new organization master record should be created within the client’s directory, they should reach out directly to the client administrator via email or telephone. If appropriate, the client administrator will create the new provider organization in their master provider directory for Onpoint’s consideration during the next cycle of attribution and measures generation.
Reporting

Onpoint PRP’s reporting component leverages the portal’s many measurement displays by curating, converting, and consolidating available data sets into a suite of tabular and graphical visualizations. A custom-built business intelligence platform, the tool transforms summary-level measure results into prepared analyses to help users consume their information efficiently for timely follow-on actions. To meet the needs of users with varying levels of experience in generating analyses from a reporting engine, the interface draws on a set of predefined data and measures while also offering an array of filters, comparisons, visualizations, and exporting options that enable deeper dives into the data. With this dynamic functionality, reporting delivered to users through the portal can remain either as one-time analyses or serve as the foundation for a recurring report that can be shared with others.

Using & Navigating Reporting Styles

By default, users of Onpoint PRP will receive a set of client-defined reports designed specifically for their individual user type(s) and role(s). These preconfigured reports, enhanced and supplemented regularly by the client administrator, are outlined as thumbnails on the landing page of each user’s Reports component. To begin exploring their set of crafted analyses, users must first select the Reports component from the portal’s main menu options (Step 1).

Step 1. Select the Reports component from the portal’s main menu options.

To learn more about the set of reports provided to them, users can hover over the 📊 icon located in the lower right-hand corner of each individual thumbnail to produce a pop-up that contains a brief description of the selected analysis (Step 2).
Step 2. Review the client-issued set of preconfigured reports from the Reports landing page.

For all clients using Onpoint PRP, there are two types of preconfigured reports offered and tailored to each user type and role:

1. **Observation Report** – This report demonstrates how an organization compares with its reporting-level peers across a set of selected measures for a single reporting period.

2. **Comparison Report** – This report demonstrates how an organization compares with its reporting-level peers across a set of selected measures and across reporting periods, product types, or a combination of the two filters.

To illustrate some of the core features and functionality of the various analyses offered to users, the *Comparison Report* will be used as a case study. For an overview of information contained in this style of reporting, see *Figure 8*. 
**Figure 8. Example of a Comparison Report**

Key features contained in a report include:

1. **Reports Title** – All preconfigured reports have established, non-editable titles; customizable reports have titles that may be edited and revised according to a user’s preferences.

2. **Reports Export** – Users who wish to generate static reports from the portal’s dynamic analyses can do so by clicking on the Export button located in the component’s banner. From the option’s drop-down menu, users can then choose whether they would like to export the selected analysis’s tabular presentation into a comma-separated values (CSV) file or print as an Adobe Acrobat Portable Document Format (PDF).

3. **Reports Save As** – Before leaving a modified preconfigured report, users must always remember to save changes using the Save icon located in the component’s banner. For changes made to a preconfigured report by a user, the portal will only allow users to “Save as” by creating a new report option for their customized analysis (Step 1).

   **Step 1. Save As changes to a customized analysis to create a new report option.**

   ![Save Custom Report](image)

   Once all alterations to a preconfigured report have been made and saved with a new title, simply click on the Done button located in the lower right-hand corner of the window. From that point on, users will have access to their customized analysis from the
component’s landing page, where a thumbnail for the tailored report will be bookmarked beneath the new My Reports category of report types (Step 2).

**Step 2.** Access customized analyses from the component’s landing page beneath the My Reports category of report types.

4. **Reports Tabular Toggle** – By default, tabular presentations of reports are configured with individual reporting-level entities (e.g., individual medical groups, individual practitioners, etc.) arranged as rows and metrics and/or comparison levels (e.g., reporting periods, product types, etc.) arranged as columns. This is perhaps the most natural layout for organizing a table. However, should users wish to reverse the table’s axes to present the individual reporting-level entities as columns and the metrics and/or comparison levels as rows, they can do so simply by selecting the button located in the component’s banner (Step 1). Users can toggle between the two tabular presentations by clicking on the button as necessary (Step 2).
Step 1. Select the Reverse Axis button located in the component’s banner.

Step 2. Toggle the axes to convert the view as wanted.

5. Report Filters – Often times, the preconfigured analyses may not provide the precisely wanted information for which users are searching. If the tabular presentation contains either too much or too little content, filters can be used to help broaden or narrow the underlying data set, effectively allowing users to view only the information that they need. Within the Comparison Report display, there are several filtering options available to users:

- **Comparison Level** – This filter allows users to compare the defined reporting level’s measure results across multiple periods of time, refine each measure’s denominator to examine only a specific product type(s), or to examine both across multiple periods of time and broken out by product type.

- **Reporting Period** – This filter allows users to toggle between measure results that have been calculated for different reporting periods. Each reporting period captures a different span of enrollment and claims data, designated by a client-defined span of incurred dates of service and/or paid claim dates and are often presented in calendar-year or rolling-year durations. With each data refresh, a new reporting period will be added to the portal’s filtering options of reporting periods.

- **Product Type** – This filter allows users to redefine the measure set’s specifications by refining each measure’s denominator to examine only a specific product type(e.g., commercial, Medicaid, and Medicare).
- **Reporting Level** – This filter allows users to select the level of reporting (i.e., self or organization) for the analysis to consider in its calculations.

- **Entities** – This filter allows users to select the actual set of entities belonging to the designated reporting level for the analysis to consider in its calculations.

- **Measures** - This filter allows users to select the set of measures for the analysis to calculate.

- **Benchmarks** - This filter allows users to select the set of benchmarks for the analysis to display with its calculations.

- **Display Options** – This filter allows users to enhance the analysis’s calculations by supplementing the data displays with additional information such as denominator counts and/or confidence intervals per measurement row (when available).

- **Product** – This filter allows users to redefine the measure set’s specifications by refining each measure’s denominator to examine only a specific product type. For example, choosing the Medicaid product type as a filter will recalculate the measurement table’s measure results using only the user’s Medicaid patient population as the basis for each denominator’s computation.

6. **Reports Table** – Onpoint PRP’s reports encourage users to compare the performance indicators of a select group of entities belonging to a single reporting level against key benchmarks and across time. By default, each preconfigured analysis will display a user type’s self-reporting level’s summary measure results.

7. **Hover Pop-ups** – For field titles, measure results, and other information displayed in a preconfigured report type that may not be immediately intuitive, users often can hover over areas to reveal pop-ups with additional descriptions and explanations. For some previews, links will be provided to redirect users to additional supporting documentation.

8. **Reports Graphical Toggle** – For users who prefer a graphical view instead of the default tabular view, Onpoint PRP easily converts the data into meaningful and useful visualizations. Users can discover the insights hidden in their data – the correlations, trends, outliers, patterns, and business conditions – at a glance with rich, interactive visuals. The reporting tool is easy to use, yet powerful enough to perform advanced calculations. To convert a tabular presentation to a graphical visualization, users must simply click on the icon located in the upper right-hand corner of the component’s banner (Step 1).
**Step 1.** Select the Graphics button located in the component’s banner.

Doing so will bring users to a graphical visualization of the data display with the same drill-down, pop-up, filtering, and exporting features as the tabular presentation (**Step 2**).

**Step 2.** View and explore the graphical visualization tool for the selected analysis.
User Management

Onpoint PRP’s user management component is an authentication feature that provides both client and user administrators with the ability to identify and control the state of users logged in to their portal networks. This includes, but is not limited to, the ability to query and filter all associated users, audit and monitor those users’ latest activities in the portal, manage and reset credentials as requested, create new users, and remove existing users from their networks.

Editing Existing Users

To edit an existing Onpoint PRP user within their organization’s network, users must first select the Portal Users component from the portal’s main menu options (Step 1).

Step 1. Select the Portal Users component from the portal’s main menu options.

Doing so will bring users to a display listing each of their organization’s existing credentialed users. From this display, users can open a form to edit and update the credentialed user’s login information by clicking anywhere in the user’s row (Step 2).

Step 2. Select an individual credentialed user from the Portal User directory.

Doing so will automatically present users with editable fields for the selected credentialed user, including their first and last names, email address, and concealed password (Step 3).
Step 3. Review the contents in the editable page detailing the selected credential user’s information.

This editable version of an individual credentialed user’s record of login information is a dynamic form that allows users to verify, update, and enrich user’s information to enable or disable the user’s permissions and privileges within the portal. Any revisions made to an individual credentialed user’s record are immediately updated and considered effective in the portal. Concurrently, the client administrator can audit all modifications made to the user management system and follow up separately with the user if necessary. After making any necessary adjustments, users must select the **Update User** button located in the lower left-hand corner of the form to confirm and implement all changes.

Also included in this editable form is the ability to associate the user with multiple organizations within the network of the user updating the form. In other words, an administrator of a medical group is able to associate a user of the same medical group with any/all of the medical group’s affiliated practices as appropriate. To do so, the user updating a credentialed user’s record can click on the **Add Role** button located in the upper right-hand corner of the form (Step 4).
Step 4. Select the Add Role button located in the upper right-hand corner of the form.

A pop-up window will appear allowing the user who is updating the record to associate the new user with a practice within the user’s own network of provider organizations. Once configured appropriately, the user completing the form must click the Add Role button located in the lower right-hand corner of the form to confirm and implement all changes (Step 5).

Step 5. Associate the credentialed user with a new role by using the drop-down menu provided in the pop-up window. Click on the Add Role button to confirm and implement all changes.

Create New Users

To create a new Onpoint PRP user within their organization’s network, users must once again select the Portal Users component from the portal’s main menu options, after which they must edit the same display listing each of their organization’s existing credentialed users. From there,
users must click on the ✆ New User option located in the upper right-hand corner of the component’s banner (Step 1). Doing so will provide users with an editable form to create a new portal user. Users will be instructed not only to enter all of the new user’s contact information, such as their first and last names and email address, but also to assign the user’s reported organizational affiliation as well as their portal role (i.e., user or administrator) and a temporary password. Once all required fields have been entered appropriately, the user completing the form must click the Create User button located in the lower left-hand corner of the form to confirm and implement all changes (Step 2).

Step 1. Click on the New User button located in the component’s banner.

Step 2. Review the contents in the editable page detailing the selected credentialed user’s information. Click on the Create User button to confirm and implement all changes.
Once a new user has been created, the user completing the form must manually contact the new user (via telephone) to provide them with their credentials: their username (i.e. their email address) and their temporary password created and assigned by the user completing the form. Note: When creating a new user, users must select the “Active” checkbox option; otherwise, the user will be labeled as inactive in the Onpoint PRP system and, consequently, will be unable to log in to their newly established account.
Documentation

Onpoint PRP’s documentation component builds a transparent knowledge base by delivering to end users a wide array of ever-updated documentation, including technical appendices on the methods and measures used in generating the portal’s many measurement and reporting components, user guides and announcements that facilitate and enhance workflows and procedures, and, of course, frequently asked questions (FAQs) that help pinpoint exact solutions to common inquiries.
Help & Support

Onpoint PRP’s help and support component is a way for users to directly reach out to the client administrator without having to open a new tab in their browser or pick up their phone. Users can simply enter their email address, name, and question or support request – and click the Contact Us button located at the bottom of the form – and their inquiries will be sent to the client administrator for follow-on action. Shortly, the client administrator will be in touch to provide further assistance.