

June 2013

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# CQS v3.7 PCC System Administrator Training



# Introduction and Topics

- CQS System Administrator functions are primarily channel-independent
- CQS Patient-centered Care Channel (PCC) System Admin Training is a review of functionality which clients might find useful as they rollout PCC to more providers

- Topics

- Pursuit List Settings

- Column Selection
    - Sorting/Filtering/Export View

- PCC Channel Subscriptions

- Dashboard Views

- Advanced Dashboard Views

- Permissions for PCC-related Features

- Schedule, Patient Search, Patient and Provider Dashboards
    - Pursuit Lists
    - Advanced Dashboards

- Reference Material

- SupportForce / CQS Documentation
    - How to Add a New End User
    - How to Add a New Admin User
    - How to Add a New Provider

# Pursuit List Settings

# Pursuit List

The CQS PCC measures are patient-centric, focusing on health status and outcomes. The Pursuit Lists function allows users to view, sort, filter, and export a listing of patients contained in their EHR. The types of lists available are as follows:

- **Administrative Pursuit List** – Basic administrative pursuit list from demographic data including deceased and inactive patients
- **Comprehensive Adult Preventative Pursuit List** – Preventative pursuit list for all patients 18 and older
- **Comprehensive Diabetes Pursuit List** – Diabetes data pursuit list for all patients who are part of the Diabetes population
- **Comprehensive Pediatric Preventative Pursuit List** – Preventative pursuit list for all patients to the age of 18
- **Diabetes Measures Summary Pursuit List** – Diabetes measure pursuit list for all patients 18 and older who are part of the Diabetes population

Dashboard	Quality	Setup	Admin	Welcome, admin	
<b>Pursuit Lists</b>					
Advanced Dashboard					
Reporting					
List	Description				
Administrative Pursuit List	Basic administrative pursuit list from demographic data including deceased and inactive patients				
Comprehensive Adult Preventative Pursuit List	Preventative pursuit list for all patients 18 and older				
Comprehensive Diabetes Pursuit List	Diabetes data pursuit list for all patients who are part of the Diabetes population				
Comprehensive Pediatric Preventative Pursuit List	Preventative pursuit list for all patients to the age of 18				
Diabetes Measures Summary Pursuit List	Diabetes measures pursuit list for all patients 18 and older who are part of the Diabetes populati				

**Pursuit Lists** are covered in more detail during PCC Preview/Orientation

# Pursuit Lists – Features

- **Select Columns** – used to select the data columns and order of display on the selected Pursuit List
- **Export All** – used to export a listing of all columns contained in the selected Pursuit list in .csv file format without customized sorts or filters. Same function as the Export button on the main Pursuit Lists screen
- **Export View** – used to export a listing of records in .csv file format as configured in the current pursuit list view

Each list is configurable allowing a user to select the columns of data to display, determine the sort order, and apply filters to narrow list results. Lists can be exported in .csv file format.

**Pursuit List: Comprehensive Adult Preventative Pursuit List**

Preventative pursuit list for all patients 18 and older

All Patients 
  Patients Using Attribution 
 2 Encounters in 2 Years (non-unique)

Patients For Provider: Praxis, J

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Name	Birthdate	Age	Gender	MRN	Last Appt	Last Appt Provider	PCP
[Expandable]	01/14/1994	18	Male	[Redacted]			
[Expandable]	06/04/1927	85	Male	[Redacted]	10/23/2008		
[Expandable]	02/22/1939	73	Male	[Redacted]	03/01/2012	Praxis, J	
[Expandable]	HCC Group RAF Risk Score Disease RAF: 0.756, Total RAF: 1.169						
[Expandable]	*Diabetes*						
[Expandable]	*Coronary Artery Disease*						
[Expandable]	*Ischemic Vascular Disease*						
[Expandable]	*Hypertension*						
[Expandable]	*Obesity*						
[Expandable]	Last BMI	42.93 kg/m2	11/25/2008	[Magnifying Glass]			
[Expandable]	Last BP	104 / 50 mmHg	11/25/2008	[Magnifying Glass]			
[Expandable]	Last LDL	80 mg/dL	08/08/2008	[Magnifying Glass]			
[Expandable]	Last HDL	61 mg/dL	08/08/2008	[Magnifying Glass]			
[Expandable]	Total Cholesterol	162 mg/dL	08/08/2008	[Magnifying Glass]			
[Expandable]	Last Triglycerides	105 mg/dL	08/08/2008	[Magnifying Glass]			
[Expandable]	Last HbA1c	7.5 %	11/19/2008	[Magnifying Glass]			
[Expandable]	Last Flu Shot		11/25/2008	[Magnifying Glass]			
[Expandable]	Last Pneumonia Shot		01/01/1999	[Magnifying Glass]			
[Expandable]	Last Antihypertensive Therapy		08/18/2007	[Magnifying Glass]			
[Expandable]	Last Tobacco Assessment		01/20/2008	[Magnifying Glass]			
[Expandable]	[Redacted]	09/19/1992	19	Male	[Redacted]		Allscripts, D
[Expandable]	[Redacted]	05/05/1992	20	Male	[Redacted]		Allscripts, D

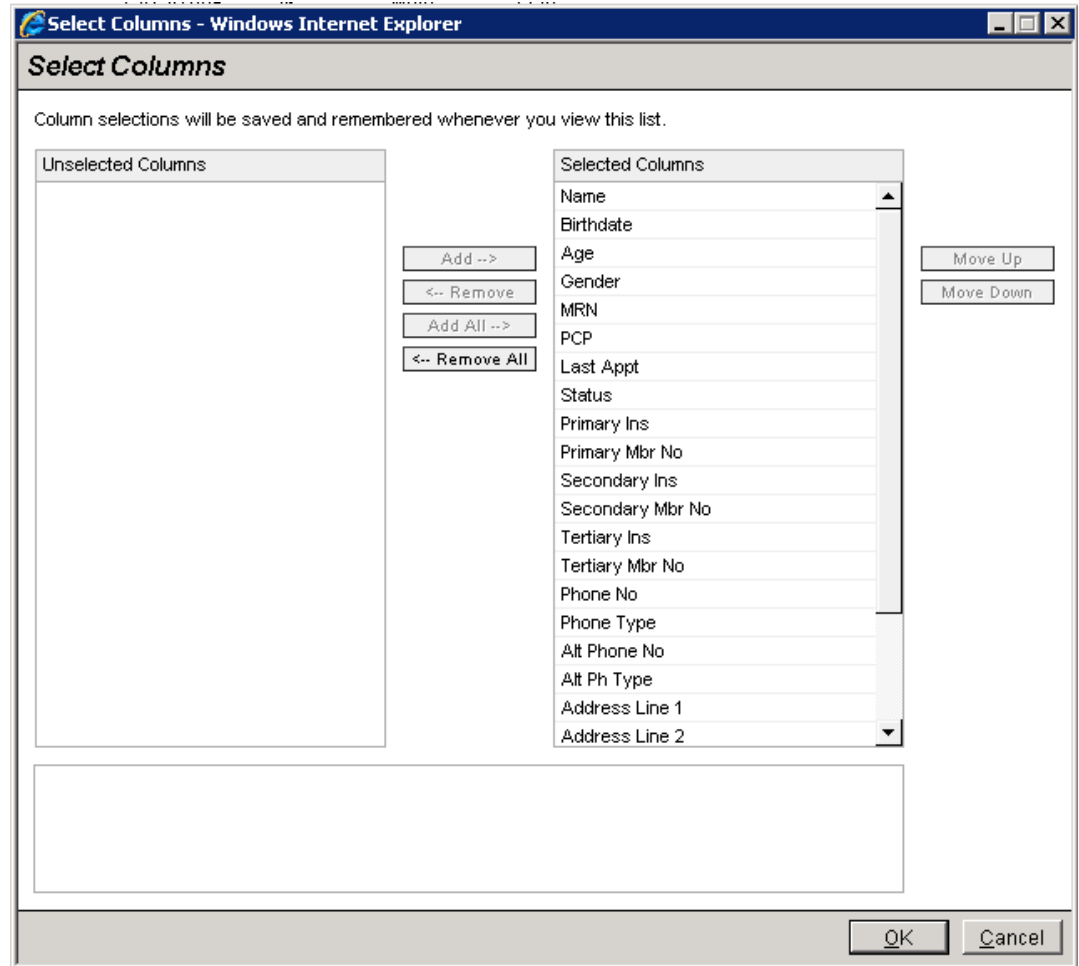
Select Columns Export All Export View Close

# Pursuit Lists – Features

- **Select Columns** – used to select the data columns and order of display on the selected Pursuit List

**Note:** Column selections and order are user-specific, which are saved between sessions.

Sort and filter options are reset each time the Pursuit List is viewed.



# PCC Channel Subscriptions

# Configuration: Content Channels

The screenshot displays the Allscripts configuration interface. The top navigation bar includes 'Dashboard', 'Quality', 'Setup', and 'Admin'. The 'Setup' menu is active, showing a sidebar with 'Customer', 'Configuration', 'Providers', 'Provider Groups', 'Organizations', 'Practices', 'Sites', 'Content Channels', and 'Dashboard Views'. The main content area shows a table of Content Channels with columns for 'Content Channels' and 'Total # of Subscribers'. The 'PQRS' channel is selected, and an 'Edit' button is highlighted with a red box. Below the table, the 'Edit Content Channel (\*)' modal is open, showing the 'Content Channel Name' as 'PQRS' and 'Active' as 'Yes'. The 'Subscribing Providers' tab is active, displaying a list of providers. An 'Add Subscribers' modal is also open, showing a search form and a list of providers. The 'Add' button in the 'Add Subscribers' modal is highlighted with a red box. A red arrow points from the 'Edit' button in the table to the 'Add Subscribers' modal.

Content Channels	Total # of Subscribers
e-Prescribing	8
HCC Recapture	21
MU	21
PHM Chronic Care and Prevention	21
PQRS	16

**Edit Content Channel (\*)**

Content Channel Name: PQRS Active: Yes

Subscribing Providers Reporting Periods

NPI Number	Name
3478921877	Allscripts, Darlene

**Add Subscribers**

NPI: [ ] Name (Last, First, MI): [ ] Search Clear

Specialty: (all)

Add All

<input type="checkbox"/>	NPI	Name
<input checked="" type="checkbox"/>	8349237130	Allscripts, Christy
<input type="checkbox"/>	3190284190	Allscripts, Denise
<input type="checkbox"/>	2104929387	Allscripts, Kathleen
<input type="checkbox"/>	6144672196	Allscripts, Melissa
<input type="checkbox"/>	1073591152	Allscripts, Provider

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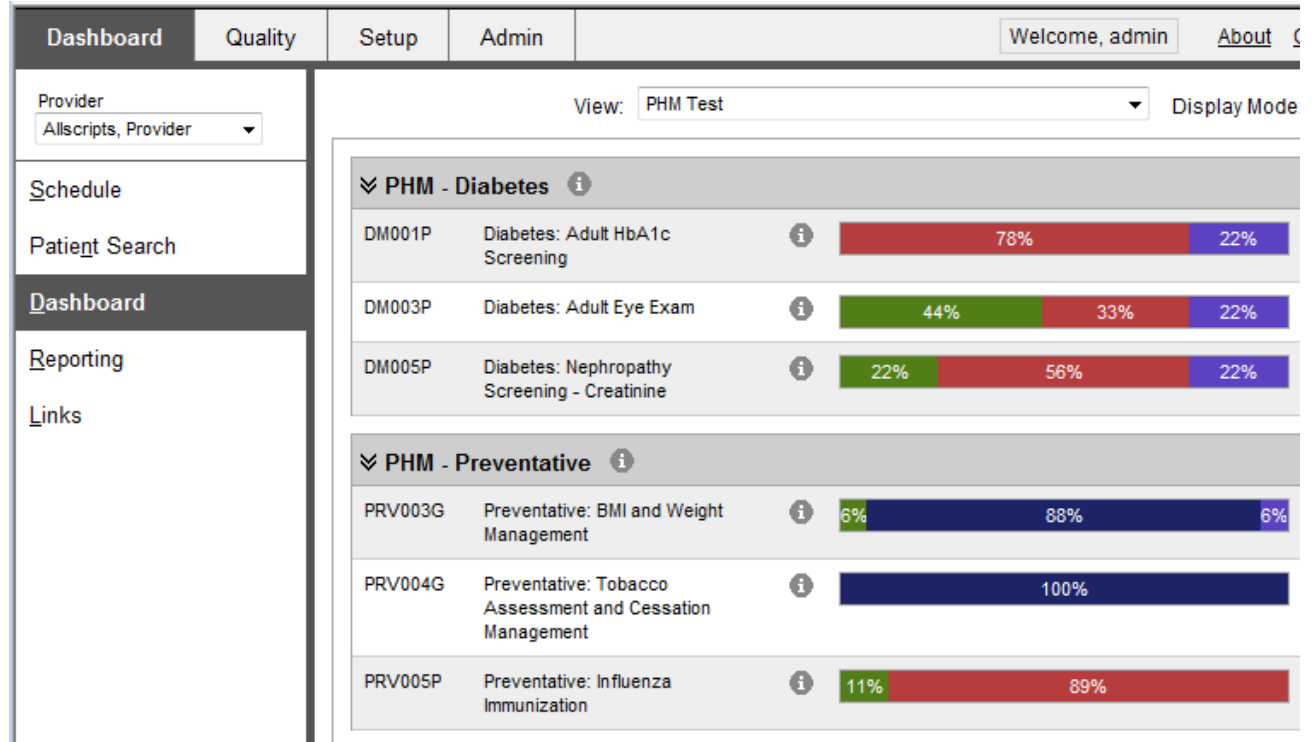
Channel Subscriptions enable a provider to view measures for the channel.

You can subscribe as many providers as you have CQS licenses.

# Dashboard Views

# Measure Selection and Dashboard Views

- CQS allows customers to configure multiple Dashboard Views consisting of selected measure combinations and attribution rules. Once created, a Dashboard View can be assigned to multiple providers at the same time instead of having to individually select measures for each provider.
- A provider can easily switch dashboard views through a View drop-down field on the aggregate and patient dashboards, if multiple dashboard views are assigned.



# Measure Selection and Dashboard Views

- Dashboard Views are defined under Setup tab → Configuration → Dashboard Views
- Dashboard Views can also be assigned through the New Provider or Edit Provider input forms
  - Setup tab → Configuration → Provider → Select Add or Edit button

The screenshot displays the Allscripts web application interface. At the top, there is a navigation bar with tabs for Dashboard, Quality, Setup, and Admin. The Setup tab is currently selected. To the right of the navigation bar, there is a user greeting 'Welcome, admin' and links for 'About', 'Change Password', and 'Logout'.

On the left side, there is a sidebar menu with categories: Customer, Configuration, Security, and their respective sub-items. The 'Configuration' category is expanded, showing 'Dashboard Views' as the selected item.

The main content area shows a table of Dashboard Views. Above the table is a search filter with a text input for 'Filter (Name or Description)', a dropdown for 'Status' set to '(all)', and 'Search' and 'Clear' buttons. The table has three columns: Name, Description, and Status. Below the table, there are buttons for 'Add', 'Edit', 'Delete', and 'Copy'. At the bottom of the table, it indicates '18 Results' and 'Page 1 of 1'. Below the table is a 'Summary' section.

Name	Description	Status
MU All	All MU Measures	Active
MU TEST	MU	Active
MU-PQRS Advanced	MU-PQRS Advanced	Active
PHM Dashboard	PHM Dashboard Test	Active
PHM Test	PHM Test	Active
PQRS-MU	PQRS-MU	Active
Reporting	Reporting Test View	Active
test	test	Active
test 1	test 1	Active
Test 2	Test 2	Active
Test Compare - All Providers	Test Compare Against All Providers	Active

# Measure Selection and Dashboard Views – Summary

**New Dashboard View (\*)**

Name \* PHM Diabetes & MU Core Description \* PHM Diabetes & MU Core Status Active  
 Show On Quality Tab

Measures **Providers** Provider Groups

**Assign to Multiple Providers**

**PHM Diabetes** Rename Copy ▲ ▼ X

Content Channel PHM Chronic Care and Prevention Attribution Rule \* Primary Care Physician (PCP) (Unique) Add Measures

Data Set:  Basic  Advanced ?

DM001G	Diabetes: Adult HbA1c Control	▲ ▼ X
DM003P	Diabetes: Adult Eye Exam	▲ ▼ X

**MU Core** Customize Section headers Rename Copy ▲ ▼ X

Content Channel MU Add Measures

Data Set:  Basic  Advanced ?

MU0013	Hypertension (HTN): Blood Pressure Measurement	▲ ▼ X
MU0028	Preventive Care and Screening: Tobacco Use: Screening and Cesi	▲ ▼ X
MU0028A	Preventive Care and Screening: Tobacco Use: Screening and Cesi	▲ ▼ X
MU0028B	Preventive Care and Screening: Tobacco Use: Screening and Cesi	▲ ▼ X

Add Section

Create multiple Sections in a Dashboard View

Add, reorder, or remove Sections or Measures

OK Cancel

**New Dashboard View (\*)**

Name \* PHM Diabetes & MU Core Description \* PHM Diabetes & MU Core Status Active  
 Show On Quality Tab

Measures **Providers** Provider Groups

NPI Number Name Add Remove

**Add Providers** X

NPI Name (Last, First, MI) Search Clear

Specialty (all) ▼

<input type="checkbox"/>	NPI	Name
<input type="checkbox"/>	1111111111	ALOHA, A
<input type="checkbox"/>	2222222222	ALOHA, B
<input type="checkbox"/>	3333333333	ALOHA, C
<input type="checkbox"/>	4444444444	ALOHA, D
<input type="checkbox"/>	5555555555	ALOHA, D

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OK Cancel

# Advanced Dashboard Views

# Advanced Dashboard

- Advanced Dashboards can be configured to enable users to compare measure performance results between aggregates, such as providers, specialties, and provider groups
- Available aggregates:
  - Specific Provider
  - Specialty & Provider Group
  - Specialty
  - All Patients (data from all patients)
  - Provider Group (custom)
  - All Providers (data from patients attributed to all providers)
- Advanced Dashboards can be utilized by Quality Managers:
  - Quality tab → Advanced Dashboard → Select the View from the dropdown menu

The screenshot shows the Allscripts Advanced Dashboard interface. The top navigation bar includes 'Dashboard', 'Quality' (selected), 'Setup', and 'Admin'. A user greeting 'Welcome, admin' and links for 'About' and 'Change Pass' are visible. A sidebar on the left contains 'Pursuit Lists', 'Advanced Dashboard' (selected), and 'Reporting'. The main content area features a 'View:' dropdown menu set to 'Compare By Specialty' and a 'Display Mode:' dropdown set to 'Standard'. Below this is a table for 'Fam Practice' with two rows of performance data:

Measure ID	Measure Name	Target	Current	Percentage	Providers
DM001G	Diabetes: Adult HbA1c Control	2	84%	13%	4 Providers
DM001P	Diabetes: Adult HbA1c Screening	2	84%	13%	4 Providers

# Advanced Dashboard (cont.)

- Advanced Dashboards can also be utilized by Providers (if assigned):
  - Dashboard tab → Dashboard → Select the View from the dropdown menu

The screenshot shows the top navigation bar with tabs for Dashboard, Quality, Setup, and Admin. A user profile 'Welcome, admin' and links for 'About' and 'Change Pas:' are visible. On the left, there is a sidebar with 'Provider' (set to 'Allscripts, Provider'), 'Schedule', 'Patient Search', and 'Dashboard'. The main content area features a 'View: Compare By Specialty' dropdown menu highlighted with a red box. Below it, a section for 'Fam Practice' contains two rows of data:

Code	Measure	Count	84%	13%	4 Providers
DM001G	Diabetes: Adult HbA1c Control	2	84%	13%	4 Providers
DM001P	Diabetes: Adult HbA1c Screening	2	84%	13%	4 Providers

- Advanced Dashboards have the ability to:
  - Drill Down (if enabled)
  - Print
  - Export (to CSV)

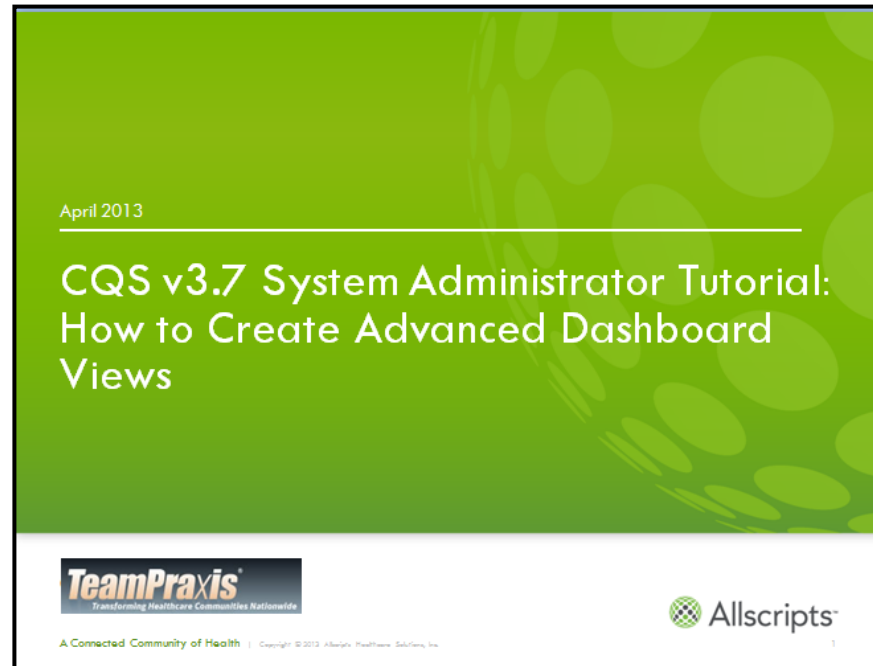
The 'Drill Down' window provides detailed information for the selected measure. It includes a title, a description of the patient population, attribution details (2 Encounters in 2 Years), and a data set of Family Practice. A legend defines HbA1c level categories: green for < 7, yellow for ≥ 7 and < 9, red for ≥ 9, blue for no current HbA1c, and a blue square for exclusion. Below the legend is a summary bar for 'Fam Practice' showing 93% results and 7% exclusion for 14 providers. A table lists individual provider results:

Provider	Results	Patients
Allscripts, Archana	83% 17%	12 Patients
Allscripts, Bobette		0 Patients
Allscripts, Denise	100%	3 Patients

At the bottom of the window, 'Print' and 'Export' buttons are highlighted with a red box.

# Tutorial: How to Create Advanced Dashboard Views

- Includes step-by-step instructions to create three example Advanced Dashboard Views
  - Example #1 – Specialty Aggregate
  - Example #2 – Provider Group Aggregate
  - Example #3 – Compare Against All Providers



# Permissions for PCC-related Features

# Dashboard Tab: User Permissions

Dashboard | Quality | Setup | Admin | Welcome, admin | About | Change F

Provider: Allscripts, Provider | Display Mode: Standar

- Schedule
- Patient Search
- Dashboard**
- Reporting
- Links

**PHM - Preventative**

PRV005P	Preventative: Influenza Immunization	25%	75%	4 Patients
PRV004G	Preventative: Tobacco Assessment and Cessation Management	25%	75%	4 Patients

**PHM - Diabetes**

DM001P	Diabetes: Adult HbA1c Screening	100%		2 Patients
DM003P	Diabetes: Adult Eye Exam	50%	50%	2 Patients

Group Name	PCC Features Accessible to User		
- View Dashboards	View Schedule	View Patient Search	View Patient and Provider Dashboards

To edit a user's permissions:

- Setup tab → Security → Users (End User accounts)
- Admin tab → Security → Users (Admin User accounts)

# Pursuit Lists: User Permissions

Dashboard   Quality   Setup   Admin   Welcome, admin

Pursuit Lists

Advanced Dashboard

Reporting

List	Description
Administrative Pursuit List	Basic administrative pursuit list from demographic data including deceased and inactive patients
Comprehensive Adult Preventative Pursuit List	Preventative pursuit list for all patients 18 and older
Comprehensive Diabetes Pursuit List	Diabetes data pursuit list for all patients who are part of the Diabetes population
Comprehensive Pediatric Preventative Pursuit List	Preventative pursuit list for all patients to the age of 18
Diabetes Measures Summary Pursuit List	Diabetes measures pursuit list for all patients 18 and older who are part of the Diabetes populati

546 Results

Name	Birthdate	Age	Gender	Last Appt	Last A
ABBEYDOR, RODMEG	02/23/1923	90	Female	01/23/2009	
ABBEYUS, SUXEL	10/08/1919	93	Male	01/23/2009	
ABEYTLAS, SELIMA C	03/19/1936	76	Female	01/30/2009	
ADAMSDUB, BUDCAL	07/22/1933	79	Male	04/24/2008	
ADAMSTYE, EYTRON M	08/12/1922	90	Female	02/03/2009	
AHRENNIA, AINEMA F	06/06/1919	93	Male	10/10/2008	
ALDERNIA, AINIAG L	07/19/1936	76	Male	09/25/2008	
ALLENAER, REAYOK S	07/07/1930	82	Male	10/21/2008	

Select Columns   **Export All**   Export View   Close

Group Name	PCC Features Accessible to User
- View Pursuit List	View Pursuit Lists
- Edit Pursuit List	Configure and Export Pursuit Lists

Note: A user needs “Edit Pursuit List” in order to use the “Export All” or “Export View” functionality

# Advanced Dashboard: User Permissions

The screenshot shows a web application interface with a top navigation bar containing 'Dashboard', 'Quality', 'Setup', and 'Admin' tabs. On the right of the navigation bar, it says 'Welcome, admin' and has links for 'About', 'Change Password', and 'Logout'. Below the navigation bar, there are two dropdown menus: 'View: Compare By Specialty' and 'Display Mode: Standard'. On the left side, there is a sidebar with 'Pursuit Lists', 'Advanced Dashboard' (highlighted), and 'Reporting'. The main content area displays a section for 'Fam Practice' with an information icon. Below this, there are two rows of data:

Code	Category	Info	Progress	Providers
DM001G	Diabetes: Adult HbA1c Control		84%  13%	4 Providers
DM001P	Diabetes: Adult HbA1c Screening		84%  13%	4 Providers

Permissions to access Advanced Dashboards on Quality tab:

Group Name	Features Accessible to User
- View Admin Dashboards	View Advanced Dashboards on Quality tab
- Edit Admin Dashboards	Export Advanced Dashboards on Quality tab

Note: To *configure* Dashboard Views (including Advanced Dashboards), a user needs one of these permissions:

- Edit Content Selection
- Edit Customer Configuration






# SupportForce / CQS Documentation

# CQS References/Support Documentation

Case Alerts Product Documentation +

Product Documentation

Allscripts Clinical Quality Solution (CQS) 3.7 All Types

	Document Title	Document Type	Document Size	Date Modified
	<a href="#">Deployment Procedures for Allscripts Enterprise EHR</a>	Manuals/Guides	1.01 MB	2012-11-19 20:59:05
	<a href="#">Quick Start Reference Guide</a>	Manuals/Guides	5.92 MB	2012-11-19 20:59:48
	<a href="#">System Administration Guide</a>	Manuals/Guides	10.9 MB	2012-11-19 21:00:06
	<a href="#">User Guide</a>	Manuals/Guides	6.24 MB	2012-11-19 21:00:44
	<a href="#">Release Notes</a>	Release Notes	527 KB	2012-11-19 20:59:21

## CQS v3.7.x Documentation

(Located on SupportForce - <https://login.salesforce.com/>)

- CQS System Administration Guide
- CQS Quick Start Reference Guide
- CQS User Guide
- CQS Release Notes
- CQS EHR SSO Deployment Procedures

# CQS References/SupportForce Ticket

Case Reports | Downloads & eServices | Product Documentation | ANSI5010 | Online Bill Pay | Contact Support My Profile | Logout

Select Module **CQS**

**Product Information**

Why are you contacting us?\*

Select a Product\*

Service Type\*

Select a Module or Area of Issue\*

Current Revision\*

Route To\*

Issue Type\*

Enter **CQS** in Subject line. This ensures ticket gets routed to CQS Support.

**Description Information**

In the section below, enter a brief description of your case in the Subject Field. In the Description field, please provide additional details, including any steps to reproduce your problem.

Subject\*

Description\*

Business Impact\*

Go-Live Blocking Issue

Internal Tracking#

## SupportForce Issue Tickets

- Contacting CQS Support
- Submitting a SupportForce Ticket
  - Questions about the CQS application
  - Issues/Errors with CQS
  - Changes to PM and EHR environments (Upgrades, Server changes, HF's)

# Additional Reference Material: How to Add a New End User

# Security: Types of Users

- End Users (defined under Setup tab)
  - Providers, Provider Staff, Quality Managers, etc.
  - Typically access CQS via EEHR using SSO
  - Can access CQS via Direct Login to Web URL (if enabled)
- Admin Users (defined under Admin tab)
  - CQS System Administrators
  - Must access CQS via Direct Login to Web URL

**Clinical Quality Solution**

**Member Sign In**

Customer Key

Username

Password

Sign In

**admin vs. <customer\_key>**

- admin: Admin Users
- <customer\_key>: End Users

Note: Customer Key is *not* case-sensitive

# Security: Add New End User (Setup tab)

The screenshot shows the Allscripts user management interface. The 'Setup' tab is highlighted in the top navigation bar. The left sidebar contains a menu with 'Users' selected. The main content area displays a list of users under the 'SSO Users' tab. The list includes columns for Username, Name (Last, First, MI), and Status. A search bar is located at the top of the list. The 'Add' button is highlighted in red. Below the list, a summary table shows details for the user 'ahsetup3'.

Username	Name (Last, First, MI)	Status
admin	Allscripts, Admin	Active
ahsclinician	Allscripts, clinician	Active
ahscustomer	Allscripts, Customer	Active
ahsetup	Allscripts, Setupuser1	Active
ahsetup2	Allscripts, Setupuser2	Active
ahsetup3	Allscripts, Setupuser3	Active
ahstech	Allscripts, Tech	Active
ahstech1	Allscripts, Tech 1	Active
ahstech2	Allscripts, Tech 2	Active
ahstech3	Allscripts, Tech 3	Active
ahsuser	Allscripts, User	Locked
ahsuser1	Allscripts, User 1	Active
ahsuser2	Allscripts, User 2	Active
ahsuser3	Allscripts, User 3	Active
ahsuser4	Allscripts, User 4	Active

Username	Name	Created
ahsetup3	Allscripts, Setupuser3	06/17/2011 2:30 PM (2) admin (admin user)

- Setup tab → Security: End Users (Providers, Provider Staff, Quality Mgr, etc.)
- Admin tab → Security: Administrator Users (System Administrators)



# Add New End User: Providers

**New User (\*)**

Username \*    Last Name \*    First Name \*    Middle Initial

Status    Contact E-mail    Contact Phone

Active

Access \*    Groups    SSO    **Providers**

Allow Direct Login

OK    Cancel

**Add Providers**

NPI    Name (Last, First, MI)    Search    Clear

<input type="checkbox"/> NPI	Name
<input type="checkbox"/> 0005200056	Allscripts, Provider
<input type="checkbox"/> 0005200156	Allscripts, Provider 2

2 Results    Page 1 of 1

OK    Cancel

Select the Provider(s) whose data the user needs access to

# Add New End User: Groups (Permissions)

The image shows a web application interface for adding a new user. The main form is titled "New User (\*)" and contains several input fields: Username, Last Name, First Name, Middle Initial, Status (set to Active), Contact E-mail, and Contact Phone. Below these fields are three tabs: "Access", "Groups", and "Providers". The "Groups" tab is selected and highlighted with a red box. A red arrow points from this tab to a modal window titled "Add Groups".

The "Add Groups" modal window contains a search filter and a table of available groups. The filter is set to "Type" with a dropdown menu showing "(all)". The table lists 10 results, each with a checkbox, a name, a type, and a description.

<input type="checkbox"/>	Name	Type	Description
<input type="checkbox"/>	Edit Comparison Tool	Role	Edit comparison tool
<input type="checkbox"/>	Edit Content Selection	Role	Edit selected measures and alerts
<input type="checkbox"/>	Edit Customer Configuration	Role	Edit customer info, measures, alerts, department
<input type="checkbox"/>	Edit Customer Security	Role	Edit groups, login history, users
<input type="checkbox"/>	Edit Dashboards	Role	Edit CQS Notes, view provider/patient dashboard
<input type="checkbox"/>	View Comparison Tool	Role	View comparison tool
<input type="checkbox"/>	View Content Selection	Role	View selected measures and alerts

10 Results Page 1 of 1

# End User Permissions: Summary

List of available Groups (permissions) that can be assigned to End Users

- Setup tab → Security → Users

Group Name	Description
Edit Admin Dashboards	Export Dashboards on Quality tab
Edit Content Selection	Manage channel subscription and configure dashboard views
Edit Customer Configuration	Edit customer configuration; Manage customer contents
Edit Customer Security	Edit customer groups and users; View login and PHI history
Edit Reporting Administration	Edit reporting administration and manage provider setups on Quality tab
Edit Pursuit Lists	Configure, export pursuit lists on Quality tab
View Admin Dashboards	View Dashboards on Quality tab
View Content Selection	View channel subscriptions and configuration of dashboard views
View Customer Configuration	View customer organizational and contents configuration
View Customer Security	View customer groups, users, login history and PHI history
View Dashboards	View patient search, aggregate/patient dashboards
View Pursuit List	View pursuit lists on Quality tab
View Reporting Administration	View reporting administration on Quality tab

For more details about permissions for PCC-related features, see [slides 17 – 20](#)

# Additional Reference Material: How to Add a New Admin User

# Add New Administrator User

The “Administrative Users” has full access to the system.

These are a collection of rights to system administrative functions which include interface maintenance, job maintenance, and administrative user security.

Clients will get the userid/password for the “siteadmin” Admin User. Clients can use the “siteadmin” to create new admin user accounts for their CQS Sys Admins.

The screenshot shows the 'Users' management interface in a web browser. The page title is 'Users - Windows Internet Explorer'. The URL is 'http://localhost/pages/home/home.aspx'. The page has a navigation menu with 'Dashboard', 'Setup', and 'Admin'. The 'Admin' menu is expanded, showing 'Customers', 'Interfaces', 'Job Maintenance', 'Jobs', 'Schedules', 'Job Queue', 'System Log', 'Security', 'Users', 'Groups', 'Login History', and 'Comparison Sets'. The 'Users' section is active, displaying a table of users. The table has columns for 'Username', 'Name', and 'Status'. There are two users listed: 'admin' (User, Admin) and 'siteadmin' (User, Site Admin). The 'Status' for both is 'Active'. To the right of the table, there are three buttons: 'Add', 'Edit', and 'Unlink'. The 'Add', 'Edit', and 'Unlink' buttons for the 'admin' user are highlighted with a red box. Below the table, there is a 'Summary' section with fields for 'Username', 'Name', 'Contact Phone', 'Contact E-mail', 'Last Login', 'Password Expiration Interval', 'Password Repeat Count', and 'Groups'. The 'Created' and 'Updated' dates are also shown. The footer of the page reads '© 2002-2010 TeamPraxis, LLC All Rights Reserved'. The browser's taskbar shows the Start button, Microsoft SQL Server Management Studio, and the current browser window. The system tray shows the Local Intranet icon, a search icon, and the time 4:26 PM.

Username	Name	Status	
admin	User, Admin	Active	Add Edit Unlink
siteadmin	User, Site Admin	Active	

2 Results Page 1 of 1

Summary

<b>Username</b> admin	<b>Name</b> User, Admin	<b>Created</b> 08/23/2010 8:07 AM (0) system (admin user)
<b>Contact Phone</b> (none)	<b>Contact E-mail</b> (none)	<b>Updated</b> 08/23/2010 8:07 AM (0) system (admin user)
<b>Last Login</b> 10/07/2010 3:05 PM	<b>Password Expiration Interval</b> Never	<b>Password Repeat Count</b> None
<b>Groups</b>		
<i>Name</i>	<i>Description</i>	
Administrators	Full access	

**Note:** Admin Users have the highest level of access in CQS.

# Add New Administrator User (cont.)

## Required Fields

- Username \*
- Last Name \*
- First Name \*
- Password \*

## Optional Fields

- Password Expiration Interval
- Non-Repeat Password

The screenshot shows a web browser window titled "New User - Windows Internet Explorer" displaying a form titled "New User". The form is divided into several sections:

- Personal Information:** Four text input fields for "Username \*", "Last Name \*", "First Name \*", and "Middle Initial".
- Contact Information:** A "Status" dropdown menu (set to "Active"), a "Contact E-mail" text input field, and a "Contact Phone" text input field.
- Access and Groups:** A section with two tabs: "Access \*" and "Groups".
- Password and Security:** Two text input fields for "Password \*" and "Confirm Password \*". Below them are two dropdown menus: "Password Expiration Interval" (set to "Never") and "Non-Repeat Password" (set to "None").
- Footer:** "OK" and "Cancel" buttons.

# Add New Administrator User: Groups (Permissions)

New User - Windows Internet Explorer

**New User**

Username \*    Last Name \*    First Name \*    Middle Initial

Status    Contact E-mail    Contact Phone

Active

Access \*    **Groups**

#	Name	Description	Type
---	------	-------------	------

**Add**    Remove    Up    Down

OK    Cancel

**Add Groups**

Filter (Name or Description)    Type    Search    Clear

(all)

<input type="checkbox"/>	Name	Type	Description
<input type="checkbox"/>	Administrators	Group	Full access
<input type="checkbox"/>	Edit Admin Configuration	Group	Edit comparison sets, interfaces, jobs, schedules,
<input type="checkbox"/>	Edit Admin Security	Group	Edit the admin level users and groups, view the
<input type="checkbox"/>	View Admin Configuration	Group	View comparison sets, customers, interfaces, jobs
<input type="checkbox"/>	View Admin Security	Group	View the admin level users, groups, and login hi
<input type="checkbox"/>	Edit Comparison Tool	Role	Edit comparison tool
<input type="checkbox"/>	Edit Content Selection	Role	Edit selected measures and alerts

**19 Results**    Page 1 of 1

OK    Cancel

**Note:** Admin Users can see data for all providers

# Admin Tab: Admin User Permissions

Dashboard Quality Setup **Admin** Welcome, admin About Change Pass

Customers

Interfaces

Job Maintenance

Jobs

Schedules

Job Queue

System Log

Security

Users

**Groups**

Login History

PHI History

Filter (Name or Description) Status (all) Type (all) Search

Name	Type	Description
Administrators	Group	Full Customer Access
View Admin Configuration	Group	View customers, interfaces, jobs, schedules, system logs
View Admin Security	Group	View the admin level users, groups, view the PHI and login history
Edit Admin Configuration	Group	Edit interfaces, jobs, schedules, modify customer (cannot delete), view system logs
Edit Admin Security	Group	Edit the admin level users and groups, view the PHI and login history
View Dashboards	Role	View patient search, aggregate/patient dashboards
View Admin Dashboards	Role	View Dashboards on Quality tab
Edit Admin Dashboards	Role	Export Dashboards on Quality tab
View Pursuit List	Role	View pursuit lists on Quality tab
Edit Pursuit List	Role	Configure, export pursuit lists on Quality tab
View Customer Configuration	Role	View customer organizational and contacts configuration

Group Name	Features Accessible to User (Admin tab)		
- Administrators	Full Customer Access		
- View Admin Configuration	View Customers	View Interfaces	View Jobs, Schedules, System Log
- Edit Admin Configuration	Modify Customers (cannot delete)	Edit Interfaces	Edit Jobs, Schedules, View System Log
- View Admin Security	View Users, Groups, Login History, PHI History on Admin tab		
- Edit Admin Security	Edit Users, Groups and View Login History, PHI History on Admin tab		

Note: The Admin Tab will only be visible to **Admin Users** who have one or more of these permissions

# Summary: End Users vs. Admin Users

- End Users (defined in Setup tab)
  - Providers, Provider Staff, Quality Team, etc.
  - Can access Dashboard, Quality, and Setup tabs\*
  - Typically access CQS via EEHR using SSO login
- Admin Users (defined in Admin tab)
  - CQS System Administrators
  - Can access Dashboard, Quality, Setup, and Admin tabs\*
  - Must access CQS via Direct Login from Web URL

	CQS Tabs				CQS Access	
	Dashboard	Quality	Setup	Admin	SSO from EEHR	Direct Login from Web
<b>End Users (Setup tab)</b>	Y*	Y*	Y*	N	Y	Y (if enabled)
<b>Admin Users (Admin tab)</b>	Y*	Y*	Y*	Y*	N	Y

\* = Depending on user permissions

# Additional Reference Material: How to Add a New Provider

# Add a Provider

Dashboard Setup Admin Welcome, admin About Change Password L

Customer  
Allscripts 5

Customer  
Configuration

**Providers**

Organizations  
Practices  
Sites  
Departments

Security  
Users  
Groups  
Login History  
PHI History

Dashboard

NPI Name (Last, First, MI)  
  Search Clear

NPI	Name	
111111112	Allscripts, Provider5	Add Edit
222222228	Allscripts, Provider6	Delete
1234567890	Allscripts, Provider8	

If the NPI does not pass the check digit test, the provider is highlighted in red

3 Results Page 1 of 1

Summary

# Add a Provider: Specialties

**New Provider (\*)**

NPI Number \* 1111111111 Last Name \* Provider First Name \* Allscripts MI Suffix

Warning: Invalid NPI number

Organizations Provider Groups **Specialties \*** Users Dashboard Views Channel Subscriptions

#	Name	CMS Code
---	------	----------

Add Remove

Edit Provider - Mozilla Firefox

http://cqs3xdoc.teampraxis.com/pages/setup/provider/provider.aspx?sticky.context=setup&provider\_id=7&parent\_id=list&height=f

**Edit Provider (\*)**

NPI Number \* 1111111112 Last Name \* Provider First Name \* Test MI Suffix

Organizations **Add Specialties**

#	Name	CMS Code
<input type="checkbox"/>	Addiction Medicine	79
<input type="checkbox"/>	All Other Suppliers	87
<input type="checkbox"/>	Allergy/Immunology	03
<input type="checkbox"/>	Ambulance Service Provider	59
<input type="checkbox"/>	Ambulatory Surgical Center	49
<input type="checkbox"/>	Anesthesiologist Assistants	32
<input type="checkbox"/>	Anesthesiology	05
<input type="checkbox"/>	Audiologist	64
<input type="checkbox"/>	Cardiac Surgeon	78

OK Cancel

Specialty can be used for  
Advanced Dashboards

# Add a Provider: Users

**New Provider (\*)**

NPI Number \* 111111111 Last Name \* Provider First Name \* Allscripts MI Suffix

Warning: Invalid NPI number

Organizations Provider Groups Specialties \* Users Dashboard Views Channel Subscriptions

Username	Name	Status	Wildcard
----------	------	--------	----------

Show Wildcard Users

**Edit Provider - Mozilla Firefox**

http://cqs3xdoc.teampraxis.com/pages/setup/provider/provider.aspx?sticky:context=setup&provider\_id=7&parent\_id=list&height=...

**Edit Provider (\*)**

NPI Number \* Last Name \* First Name \* MI Suffix

**Add Users**

Username Name (Last, First, MI) Search Clear

<input type="checkbox"/>	Username	Name
<input type="checkbox"/>	admin	Allscripts, Admin
<input checked="" type="checkbox"/>	ahsuser	Allscripts, User
<input checked="" type="checkbox"/>	ahsuser1	Allscripts, User1
<input checked="" type="checkbox"/>	cqstech	Allscripts, CQStech
<input type="checkbox"/>	siteadmin	Allscripts, SiteAdmin

5 Results Page 1 of 1

OK Cancel

Add Provider username

Add Users who need access to a Provider's data (Provider Staff, etc.)

# Add a Provider: Dashboard Views

**New Provider (\*)**

NPI Number \* 111111111 Last Name \* Provider First Name \* Allscripts MI Suffix

Warning: Invalid NPI number

Organizations Provider Groups Specialties \* Users **Dashboard Views** Channel Subscriptions

Name Description

**Add Dashboard Views**

Name or Description

Search Clear

<input type="checkbox"/>	Dashboard	Name	Description
<input type="checkbox"/>	CMS	Custom View 1	Any Diabetes Related
<input type="checkbox"/>	CMS	Custom View 2	eRx only
<input type="checkbox"/>	CMS	Custom View 3	To show more than 1 channel at a time
<input type="checkbox"/>	PHM	PHM	Patient Health
<input type="checkbox"/>	PHM	PHM Custom View 1	PHM Asthma measures
<input type="checkbox"/>	CMS	Selected Measures for A	Selected Measures for Allscripts, Anthony (45213
<input type="checkbox"/>	CMS	Selected Measures for A	Selected Measures for Allscripts, Benjamin (238

25 Results Page 1 of 1

OK Cancel

A Dashboard View consists of selected measure combinations (and attributions, if applicable) which determine the display on a provider's dashboards.

# Add a Provider: Channel Subscriptions

### New Provider (\*)

NPI Number *	Last Name *	First Name *	MI	Suffix
1111111111	Provider	Allscripts		

Warning: Invalid NPI number

Organizations | Provider Groups | Specialties \* | Users | Dashboard Views | Channel Subscriptions

Available Content Channels		Subscribed Content Channels
e-Prescribing	<input type="button" value="Add --&gt;"/> <input type="button" value="Remove &lt;--"/>	PHM Chronic Care and Prevention
HCC Recapture		
MU		
PQRS		

Channel Subscriptions enable a provider to view measures for the channel

# Add a Provider: Provider Map

When adding a new provider to CQS, there are Provider Mappings that must be added. These are under the Admin tab.

In the “Interfaces” menu, you are required to map new providers under the Provider Map.

**The Provider Mapping needs to be done for both the EHR and PM interfaces.**

The screenshot shows the Allscripts Interfaces Admin interface in Internet Explorer. The 'Admin' tab is selected, and the 'Interfaces' menu is open. The 'Provider Map' section is expanded, showing a list of mappings for two systems: CQS06EHR and CQS06PM. Red boxes highlight the 'Provider Map' entries for both systems. Below the list, a 'Summary' section shows a table of destination values.

Mapping Name	Type	Description
Provider Map	Customer	Provider Map

Customer	Total	Mapped	Unmapped
Test Data	21	17	4

# Provider Map (cont.)

Dashboard Setup **Admin** Welcome, admin About Change Password

Customers

**Interfaces**

Job Maintenance Jobs Schedules Job Queue System Log Security Users Groups Login History PHI History Comparison Sets Reports

Search System Type Filter (System Key or Name) Enabled

Systems (all) Search Clear

System	Name	Type	Enabled
CGS05	CQS 05	Allscripts Enterprise EHR	Yes
PM_3600	PM 3600	ConnMD PM	Yes

Mapping

Mapping	Type	Description
Organization Map	Customer	Map native groups to CQS organizations
Payer Type Map	System	Map native payers to CQS payer types
Practice Map	Customer	Override automatic mapping of native tax IDs 1
Provider Map	Customer	Map native providers to CQS providers

Customer

Customer	Name	Description	Entries
CUST2	Allscripts 2	Allscripts Customer 2	
2	ALOHA MD, Samuel M	0002300024	

Site Map

Site Map	Name	Type	Enabled
PM_3684	PM 3684	ConnMD PM	Yes
PM_3721	PM 3721	ConnMD PM	Yes
PM_3749	PM 3749	ConnMD PM	Yes

5 Results

Summary

Customer	Name	Description
CUST2	Allscripts 2	Allscripts Customer 2

Destination Values

Total	Mapped	Unmapped
1	1	0

Edit Mapping Entries - Mozilla Firefox

http://cqs3.doc.teampraxis.com/pages/admin/interface/mapping\_entry.aspx?sticky:context=admin&width=734&height=669&system\_mapping\_id=23&value\_checksum=526

### Edit Mapping Entries

Destination Value: 4 Name: ALOHA, Thomas M

Description: 0004400046

Available Source Values

Source Value Filter (Name or Description) Search Clear

Value	Name	Description
6	z11967 non,	1111111111
7	z11967 npl,	1205815594
5	zNonBill, QA	

4 Results Page 1 of 1

Mapped Source Values

Value	Name	Description
1	Provider, Samuel	

6/28/2013