

REGISTRATION USER GUIDE

For Eligible Professionals

Medicaid Electronic Health Record (EHR) Incentive Program





JULY 2012 (07.02.12 ver5)

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Disclaimer

The Centers for Medicare & Medicaid Services (CMS) is providing this material as an informational reference for physicians and non-physician practitioners-providers.

Although every reasonable effort has been made to assure the accuracy of the information within these pages at the time of posting, the Medicare and Medicaid program is constantly changing, and it is the responsibility of each physician, non-physician practitioner, supplier or provider to remain abreast of the Medicare and Medicaid program requirements.

Medicare and Medicaid regulations can be found on the CMS Web site at http://www.cms.gov

Step I – Getting Started

This is a step-by-step guide for the Medicaid Eligible Professionals (EPs) Electronic Health Record (EHR) Incentive Program. The page layout consists of the registration screen with written instructions to the right, as well as helpful tips. To get started, click on the link at the top of the page or type the website into your computer's browser.



Welcome to the Medicare & Medicaid EHR Incentive Program Registration & Attestation System

About This Site

The Medicare and Medicaid Electronic Health Records (EHR) Incentive Programs will provide incentive payments to eligible professionals and eligible hospitals as they demonstrate adoption, implementation, upgrading, or meaningful use of certified EHR technology. These incentive programs are designed to support providers in this period of Health IT transition and instill the use of EHRs in meaningful ways to help our nation to improve the quality, safety, and efficiency of patient health care.

This web system is for the Medicare and Medicaid EHR Incentive Programs. Those wanting to take part in the program will use this system to register and participate in the program. Additional Resources: For User Guides to Registration and Attestation that will show you how to complete these modules, a list of EHR technology that is certified for this program, specification sheets with additional information on each Meaningful Use objective, and other general resources that will help you complete registration and attestation, please visit CMS website

Eligible to Participate - There are two types of groups who can participate in the programs. For detailed information, visit $\underline{\mathsf{CMS}}$ website \Box .

Overview of Eligible Professional (EP) and Eligible Hospital Types

Eligible Professionals (EPs)

- Medicare EPs include:
 Doctors of Medicine or Osteopathy
- Doctors of Dental Surgery or Dental
- Doctors of Podiatric Medicine
- · Doctors of Optometry
- Chiropractors

Medicare Advantage Organization (MAO) EPs - A qualifying MAO may receive an incentive payment for their EPs. For more information, visit CMS website

NOTE: EPs may NOT be hospitalbased. This is defined as any provider who furnishes 90% or more of their services in a hospital setting (inpatient or emergency room).

Medicaid EPs include:

- Physicians
- Nurse Practitioners
- · Certified Nurse Midwife
- Dentists
- Physicians Assistants who practice in a Federally Qualified Health Center (FQHC) or Rural Health Center (RHC) that is led by a Physician Assistant

- Further, Medicaid EPs must also:
 Have a minimum of 30% Medicaid patient volume (20% minimum for pediatricians),
- Practice predominantly in a FQHC or RHC and have at least 30% patient volume to needy individuals

Eligible Hospitals

- Medicare Eligible Hospitals include:
 Subsection (d) hospitals in the 50 states or DC that are paid under the hospital inpatient prospective payment system. Hospitals in Maryland may also participate per
- · Critical Access Hospitals (CAHs)
- Medicare Advantage Affiliated hospitals (MA-Affiliated Hospitals)

Medicaid Eligible Hospitals include:

- Acute Care Hospitals with at least 10% Medicaid patient volume. May include CAHs and cancer hospitals.
- · Children's Hospitals



Continue

Web Policies & Important Links 🖃

Department of Health & Human Services

CMS.gov 🖃

Accessibility 5

File Formats and Plugins





To determine your eligibility, click on the CMS website

STEPS

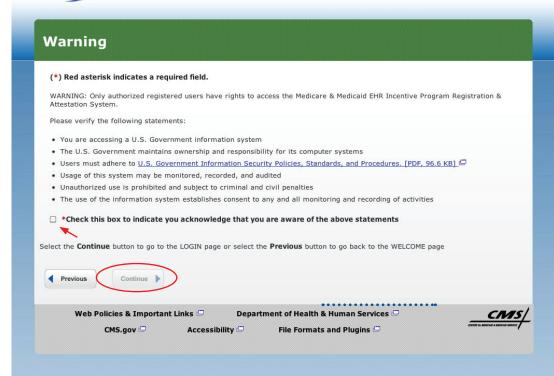
Enter the EHR Incentive Program URL (located at the top of the page) into your web browser

Click Continue to start the registration process

Step I - Continued

Carefully review the screen for important information.





STEPS

Please read the statements on the page and check the box to indicate that you acknowledge that you are aware of the statements

Click Continue



TIP

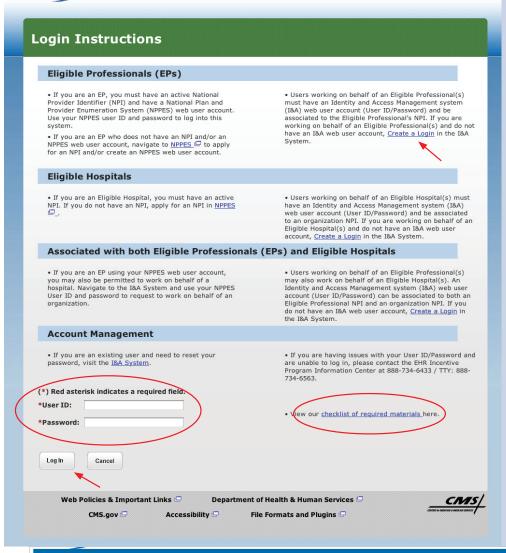
Eligible Professionals (EPs) may not be hospital based. This is defined as EPs seeing 90% or more of their Medicare covered services in:

- Hospital Inpatient setting (Place of service 21)
- Emergency Department setting (Place of service 23)

Step 2 – Login

Review the Login Instructions for Eligible Professionals.





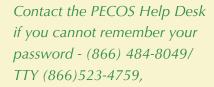


You will be navigated to the I&A system, which will allow you to create a User ID/password, establish a user profile, and request access to organization(s) for the EHR Incentive Program System.

If you select "Yes", you will be directed to the I&A system and will be required to log in again.



YES NO



https://pecos.cms.hhs.gov

To locate your NPI number, visit:

https://nppes.cms.hhs.gov/NPPES/NPIRegistryHome.do

User name and password are case sensitive

STEPS

Enter your National Plan and Provider Enumeration System (NPPES) web user account, user ID and password to log into the registration system

Click Log In

Eligible Professionals (EPs) may authorize surrogate users to work on behalf of the EP in the EHR Incentive **Program Registration & Attestation system**

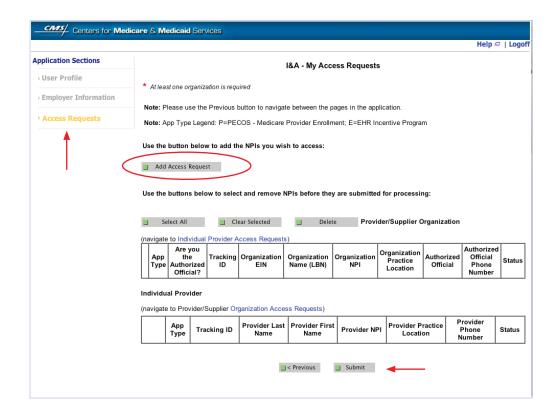
Click on the "Create a *Login link"* in the body of the screen

Click YES to access the **I&A** system

Click the link to view our "checklist of required" materials to register for the EHR **Incentive Programs**



Working on Behalf of an Eligible Professional



STEPS

Click on Access Requests

Click Add Access Request

Click Submit

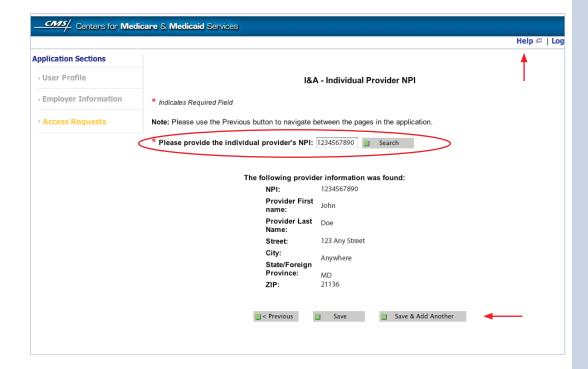


TIP

At least one NPI is required to assign access Use the Previous button to navigate between pages in the system

In order for a provider to create an online account, the NPI record must be in the status of Active or Pending Change Request

Working on Behalf of an Eligible Professional



STEPS

Enter the NPI of the individual provider

Click Search to display the details of the individual provider

Click Save to navigate to the "My Access Requests Page"

<u>Or</u>

Click Save & Add Another to add multiple providers



TIP

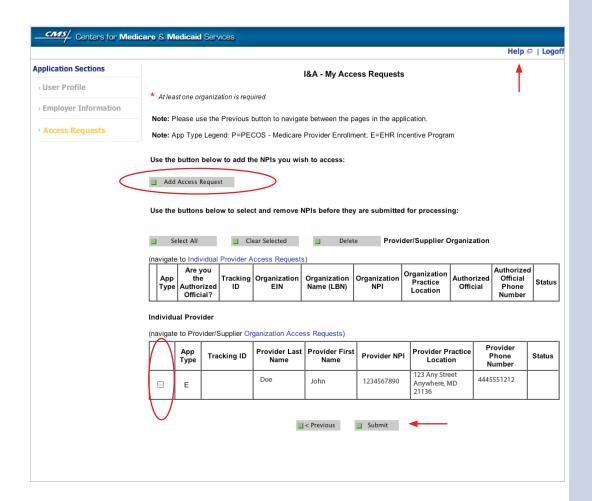
Clicking Previous will take you back to the 'Select Application Type' page



Click on HELP for additional guidance to navigate the system

The Help link is on every page

Working on Behalf of an Eligible Professional



STEPS

Choose the Individual Provider(s) to add the NPIs you wish to access

You may choose one at a time or click Select All

Use the Add Access Button button to add the NPIs you wish to access

Click Submit



TIP

Clicking Previous will take you back to the 'Select Application Type' page Click on HELP for additional guidance to navigate the system

The Help link is on every page

CMS/ Centers for Medicare & Medicaid Services

Working on Behalf of an Eligible Professional

Thank you. Your request will be processed.

Please read the following instructions:

Applying as an Authorized Official:

If you are applying as an Authorized Official, a copy of your provider or supplier's organization CP-575 is required. The CP-575 is generated to the organization by the Internal Revenue Service (IRS), and contains the organization's Legal Business Name and Taxpayer Identification Number. If you cannot locate your CP-575, contact the IRS for a copy of your IRS Federal Tax Deposit Coupon, IRS 147C letter, or other official IRS document which verifies the taxpayer identification number and legal business name of your organization. Make a photocopy of the CP-575 or appropriate substitute and write your PECOS I&A Tracking ID at the top of the photocopy. Mail the photocopy of the CP-575 or appropriate substitute (with the Tracking ID written on it) to the CMS External User Services (EUS) Help Desk. Your application will not be processed until the EUS Help Desk receives this paperwork. An e-mail notification will be sent to you once the EUS Help Desk has approved or rejected your request. If you have questions, please contact the EUS Help Desk at the following address and telephone number:

External User Services (EUS)
PO Box 792750
San Antonio, Texas 78216
Phone:1-866-484-8049
TTY:1-866-523-4759
EUSSupport@cgi.com

For questions concerning the Electric Health Record (EHR) Incentive Program, please contact the EHR Incentive Program Information Center (EIPIC) at the following address and telephone number:

EHR Incentive Program Information Center (EIPIC) Phone: 1-888-734-6433 TTY:1-888-734-6563

Applying as an Organization end user:

If you are applying as an organization end user and have questions, please contact your Authorized Official. An e-mail notification will be sent to you once your request has been approved or rejected.

Applying to act on behalf of an individual provider:

If you are requesting to act on behalf of an individual provider and have questions, please contact the individual provider or the appropriate help desk using the above contact information. If your request is not approved in a reasonable amount of time, please contact the individual provider.

User Name: John Doe

Note: App Type Legend: P=PECOS - Medicare Provider Enrollment; E=EHR Incentive Program

Provider/Supplier Organization

App Type	Tracking ID	Provider/Supplier Organization EIN	Provider/Supplier Organization Name(LBN)	Organization NPI

Individual Provider

Арр Туре	Tracking ID	Individual Provider Last Name	Individual Provider First name	NPI
E	S03162011689377	Doe	John	1234567890

1

Please provide tracking number on all correspondence

Return to Home System

STEPS

Help 🖾 | Logoff

Access request receipt

You will receive an email notification that the External User Services (EUS) Help Desk has approved your request

Record your tracking number for use on any correspondence

The EP must log into the I&A system and approve your request

Notify the EP that you have requested access

At this time there is not an automated email notification of the I&A system



The EP's user ID and password are the same for the NPPES system

A proxy user may only register and attest for 1,000 eligible professionals For questions regarding the EHR Incentive Program –

EHR Information Center 1-888-734-6433 TTY/1/888-734-6563

Working on Behalf of an Eligible Professional



STEPS

Application and Security Check Page prompts the user to answer 2 security questions

Centers for Medicare & Medicaid Services				
I&A - Create User ID and Password				
* Indicates Required Field				
Please create a l Creating ar	Jeer ID and password for accessing I&A and the systems that use I&A. organization user account does not represent applying for an NP1.			
* User ID:				
	Note: Personal information, such as a Social Security Number, should not be used as the User ID. The User ID can contain a maximum of four digits. Please note: The User ID cannot be changed.			
* Password: * Retype Password:				
i de la composition della comp	Note: Password must be 8-12 characters long, contain at least one letter, one number, no special characters, and not be the same as the User ID.			
* Select Secret Question 1:	:			
* Answer 1: * Select Secret Question 2:				
* Answer 2:				
* Select Secret Question 3: * Answer 3:				
* Select Secret Question 4: * Answer 4:	÷			
* Select Secret Question 5:	:			
* Answer 5:				

	Help	
Application Sections	I&A - User Profile	
· User Profile	* Indicates Required Field	
- Employer Information		
› Access Requests	Note: All notifications will be sent to the e-mail provided on this page.	
	User Profile Information:	
	Prefix: * First Name: Middle: * Last Name: Suffix: Credential(e): (M.D., D.O, etc.)	
	* Date of Birth: (MM/DD/YYYY)	
	* E-mail Address: * Retype E-mail Address:	
	■ Next >	

	Help □ Logo
Application Sections	I&A - Employer Information
User Profile	* Indicates Required Field
Employer Information	Note: Please use the Previous and Next buttons to navigate between the pages in the application.
Access Requests	Please enter your employer's information below. If your employer works on behalf of a provider/supplier organization, information for those provider/supplier organizations will be collected separately.
	Provide Your Employer's EIN And Employer Legal Business Name/Legal Name
	* Employer EIN:
	* Employer Legal Business Name/Legal Name:
	Employer's Mailing Address Information
	* Address Line 1: (Street Number and Name)
	Address Line 2: (e.g. Suite Number)
	* City: * State: * ZIP + 4
	Country: United States •
	*Phone Number: Extension: Fax Number: (Without Dashes) (Without Dashes)
	<pre> < Previous</pre> <pre> Next ></pre>

TIPS Click on the HELP tab at the top of the screen for help creating your I&A user name and password

User IDs cannot be changed. Once you have successfully created a User ID and Secret Question/Answer combinations and submitted the record, the User ID and Secret Question/ Answer combinations will remain tied to your record and will not be changed

User name and password are case sensitive

Step 3 - Welcome

If your login was successful you will receive the "Welcome Screen".



STEPS

Click on the Registration tab to continue registering for the EHR Incentive Program



The Welcome screen consists of four tabs to navigate through the registration and attestation process.

- 1. Home
- 2. Registration
- 3. Attestation
- 4. Status

Meaningful Use information:

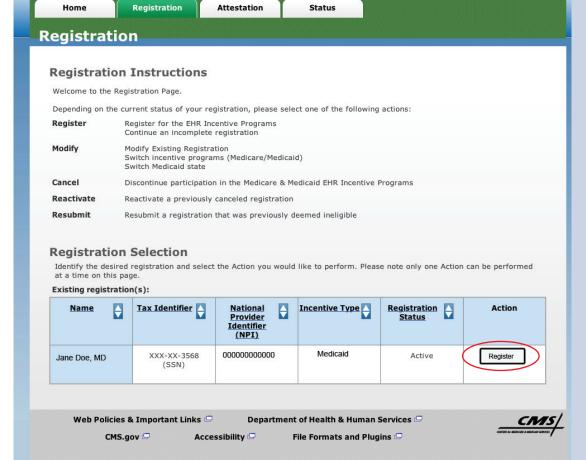
https://www.cms.gov/EHRIncentivePrograms/30_Meaningful_Use.asp

Step 4 – Registration



 Log Out
 Help⊡

 Welcome
 Your Name
 My Account



STEPS

Click on *Register* in the Action column to continue the registration process



"Resubmit", "Modify",
"Cancel" and "Reactivate"
are the available Action web
links for returning users

Only one
action can be
performed at a
time on this page

If the user selects the Action web link of "Register" or "Resubmit" they will be directed to the Topics for Registration screen

Step 5 - Reason for this Registration

Review and follow the registration instructions below.



STEPS

Click on *Topic 1* - "EHR Incentive Program" to start



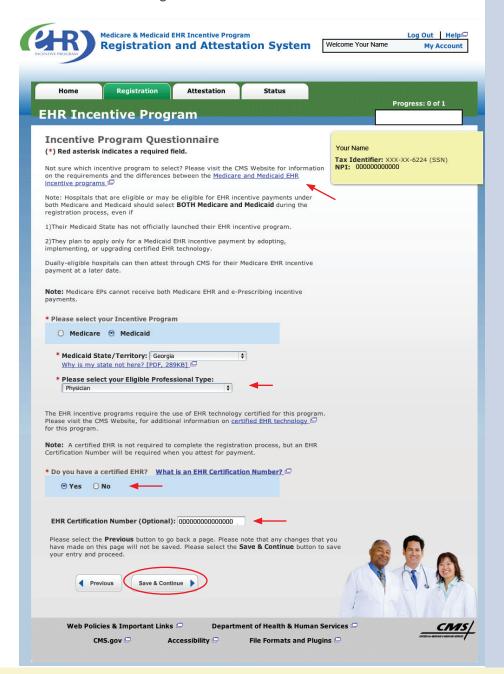
Data required for this registration is grouped into three topics. All three must be **completed**

Progress bars will indicate the progress for each topic

When all topics are completed user can select Proceed with Submission

Step 6 - Incentive Program Questionnaire

Review and follow the Incentive Program Questionnaire instructions below.



STEPS

Select Medicaid

Select your Medicaid State/Territory

Select your Eligible Professional Type.

Click Yes or No at "Do you have a certified EHR?" If yes, enter the EHR Certification Number

Click Save & Continue



TIPS

States are launching their programs at different times, so your state may not yet be available. Click on the CMS website link for more information.

https://www.cms.gov/ EHRIncentivePrograms/ Click on the CMS
EHR Certification
Number website
to obtain your
certified EHR
number.

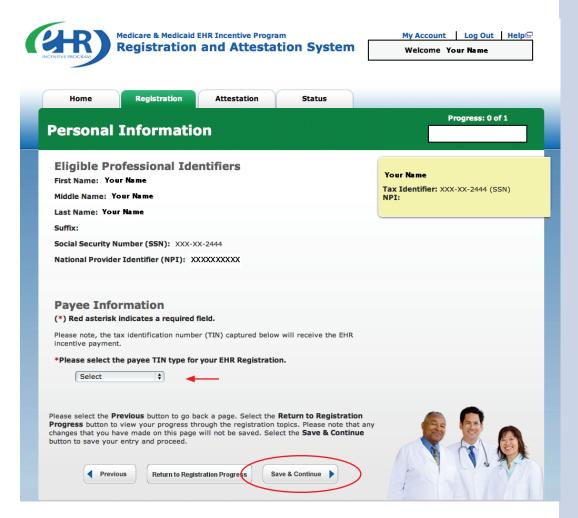
http://healthit.hhs.

Follow the instructions on the website to locate your CMS EHR Certification Number

You must enter your certification number when Attesting for the EHR Incentive Program. The number is not required for registration

Step 7 – Personal Information

Follow the instructions below regarding your personal information.



Please note, the tax identification number (TIN) captured below will receive the EHR incentive payment

APPLY D

STEPS

Select where your payment will go in the **Payee TIN Type**

Click APPLY

SSN Payee TIN Type indicates that the provider receives the payment

Enter the Group Name and Group Payee TIN and NPI Number

Click Save & Continue



Medicaid EPs can elect to have their payment go to another qualified entity by selecting Payee TIN Type of EIN. and this information will be sent to the State

Identifiers

*Payee TIN Type:

*Group Name:

Payee TIN: *Pavee NPI:

(*) Red asterisk indicates a required field.

Social Security Number (SSN): XXX-XX-3458 (SSN) National Provider Number (NPI): 123456789

EIN 💠 APPLY 💟

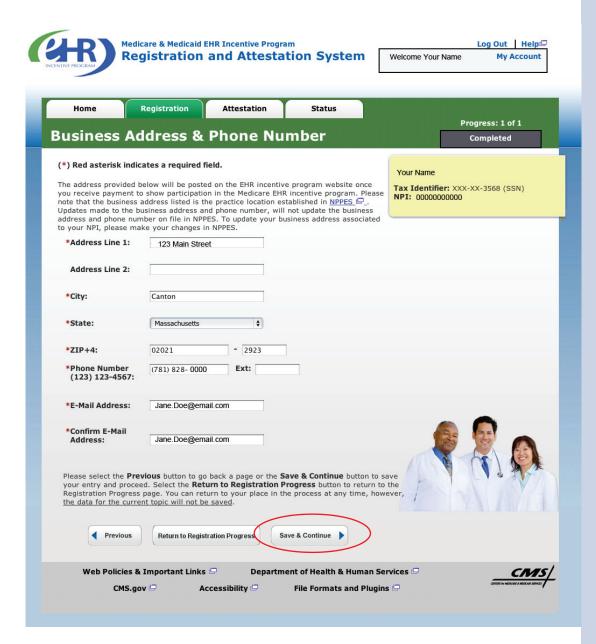
Sunset Physicians, Inc. Pacific Providers

There are rules around reassignments governing this program, please see the CMS website for more information: http://www.cms.gov/EHRIncentivePrograms/



Step 8 - Business Address and Phone

Be sure to complete all requested information.



STEPS

Review the Business Address & Phone information and revise if applicable.

Enter your e-mail address and confirm the e-mail address.

Click Save & Continue

You will receive an e-mail confirmation once you have successfully completed your registration



Data on this page is pulled from the provider's practice location stored in NPPES

Address and Phone number can be changed for purposes of this program, however it will not update your NPI record in NPPES

If this information is incorrect, please update your NPPES account as well

Step 9 – Registration Progress

FOR MEDICAID ELIGIBLE PROFESSIONALS

Be sure to complete all the topics below.



STEPS

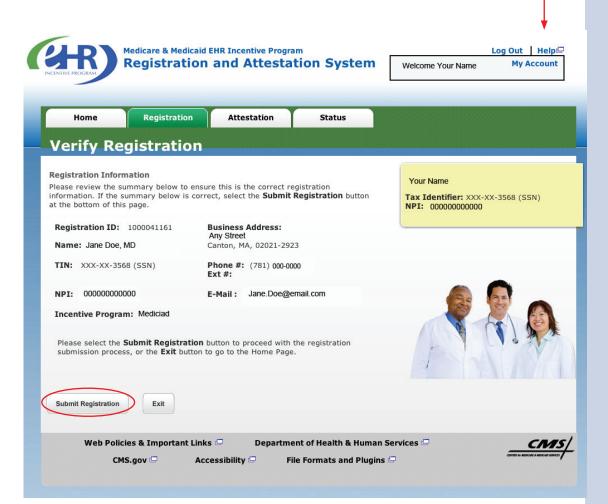
Click on *Proceed*with Submission
to continue the
registration process



Progress bars indicate that the topics are **completed**

Step 10 - Verify Registration

Be sure to verify all your personal information.



STEPS

Review your registration information for accuracy and click *Submit Registration* to continue.

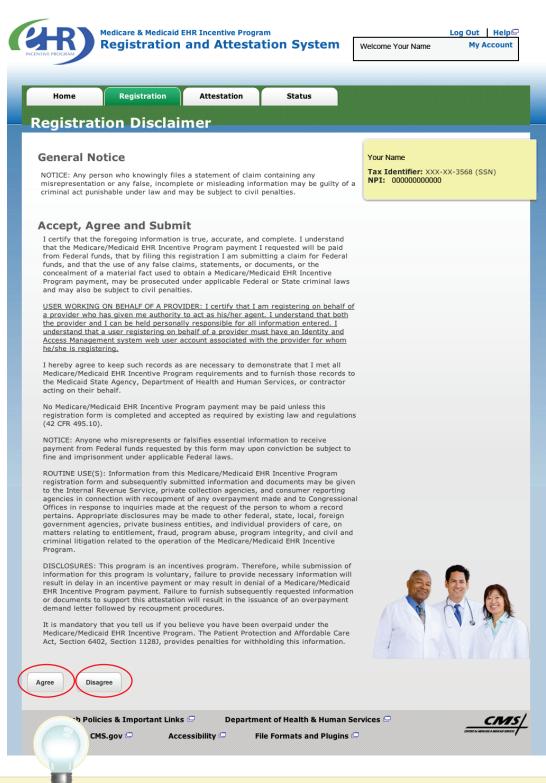


Click on Exit to go to the home page

Click on Help link for additional guidance for the registration and attestation process

Step II - Registration Disclaimer

Be sure to read the entire disclaimer.



STEPS

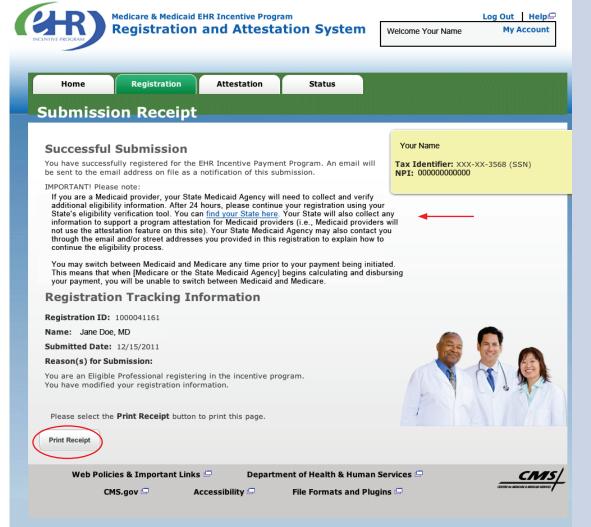
Read the disclaimer and click on *Agree* or *Disagree* at the bottom of the page.



If DIsagree is chosen, the user is directed to the Registration Instructions Page. To restart the process, click MODIFY in the Action column of the Registration Instructions Page

Step 12 - Submission Receipt (Successful Submission)

Confirm that your registration was completed successfully.



STEPS

You must contact your State to complete your registration

Continue your registration using the State's Medicaid EHR registration tool

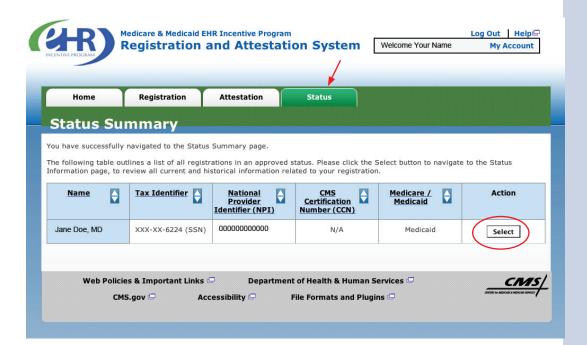
Click on You can
"find your State
here" to complete
the Medicaid
registration



Wait 24 hours to contact your State to finish the registration, to allow for processing Print a copy of the receipt for your records.

Step 13 – Status Summary

Review all current and previous information related to your account.



STEPS

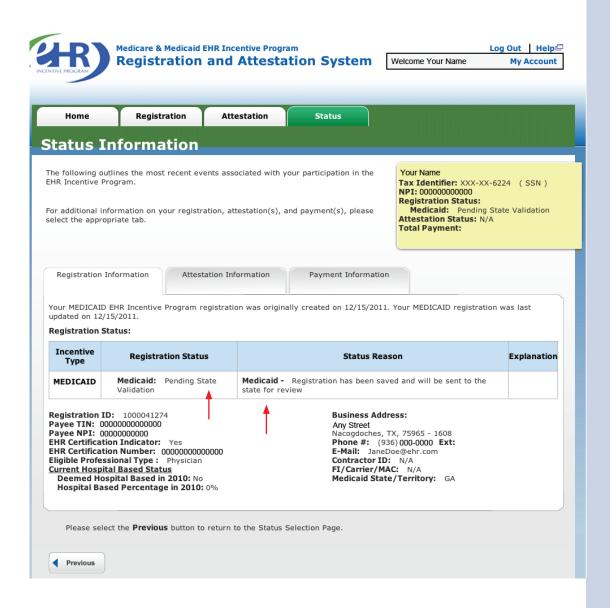
Click the *Status* tab to view registration information



Click Select in the Action Column to view detail.

Step 13 – Status Information

Review the details of your registration process.



STEPS

Registration details appear in the body of the screen

Information displayed includes:

- The registration status reason
- Fiscal Intermediary
 (FI)/Carrier/
 Medicare
 Administrative
 Contractor (MAC)
- Validation performed on registration



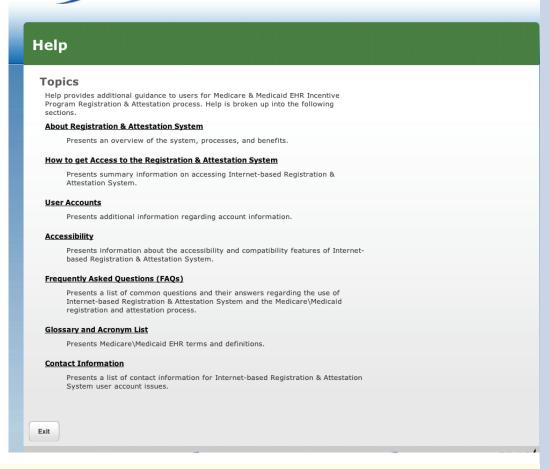
Registration status will read "Medicaid: Pending State Validation" until the registration process is completed by the State

Other registration statuses are Cancelled, Issue Pending, In Progress, Rejected, and locked for payment The status reason is listed under the blue header in the center of the screen

Have Questions?

There are many resources available to you.





Resources

Contact the EHR Information Center Help Desk for Questions concerning registration, (888) 734-6433 / TTY: (888) 734-6563

Hours of operation: Monday-Friday 8:30 a.m. – 4:30 p.m. in all time zones (except on Federal holidays)

NPPES Help Desk for assistance. Visit; https://nppes.cms.hhs.gov/NPPES/Welcome.do, (800) 465-3203 / TTY (800) 692-2326



EHR Incentive Program; visit

https://www.cms.gov/EHRIncentivePrograms/

STEPS

Click on the *Help Link* which is located on every screen

Acronym Translation

CMS Centers for Medicaid & Medicaid Services

DMF Social Security Death Master File

EH Eligible Hospital

EHR Electronic Health Record

Employer's Identification Number

EIPIC EHR Incentive Program Information Center

Eligible Professional Fiscal Intermediary

Federally Qualified Health Center Identification & Authentication System

IDR Integrated Data Repository
Legal Business Name

MAC Medicaid Administrative Contractor Medicaid Advantage Organization

NPI National Provider Identifier

NPPES National Plan and Provider Enumeration System

NLR National Level Repository
OIG Office of the Inspector General

RHC Rural Health Center
SSN Social Security Number
TIN Tax Identification Number

ACRONYMS

