

REGISTRATION USER GUIDE

For Eligible Professionals

Medicare Electronic Health Record (EHR) Incentive Program





CONTENTS

Getting starte	ed 3
tep 2Logi	n 5
tep 3Welcome	e 12
tep 4 Registration instruction	s 13
tep 5	n 14
tep 6	e 15
tep 7Personal information	n 16
tep 8 Business address & telephone numbe	r 19
tep 9 Registration proces	s 20
tep 10 Verify registration	1 2 I
tep II Registration disclaime	r 22
Submission receip	t 23
tep 13Status information	n 25
Questions/Help	27
Acronym translation	28

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 program is constantly changing, and it is the responsibility of each physician, non-physician practitioner, supplier or provider to remain abreast of the Medicare program requirements.

Medicare 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 Medicare 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) 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 $\underline{\sf CMS}$ website $\underline{\sf IG}$

Eligible to Participate - There are two types of groups who can participate in the programs. For detailed information, visit CMS website .

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 law.
- · 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



Web Policies & Important Links 🖵

Department of Health & Human Services

CMS.gov 🗁

Accessibility -

File Formats and Plugins





To determine your eligibility, click on the CMS website

Providers must register and attest by February 28th or 29th for leap years

STEPS

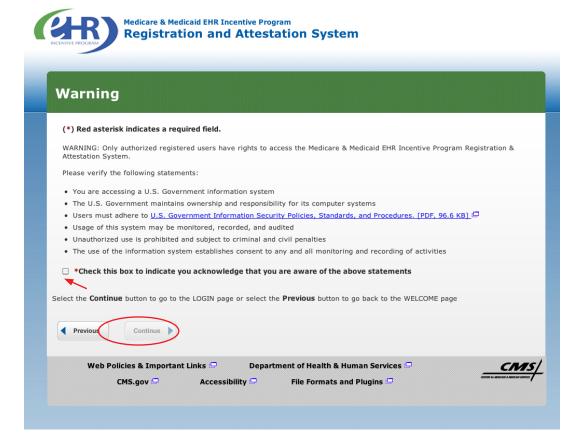
Enter the EHR Incentive Program URL (located at the top of the page) into your web browser

Review the list of **Eligible Professionals** (EPs) presented on this screen

Click Continue to start the registration process

Step I - (Continue)

Carefully read 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



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)

TIP

Step 2 - Login

Review the Login Instructions for Eligible Professionals.



Login Instructions Eligible Professionals (EPs) Users working on behalf of an Eligible Professional(s) must have an Identity and Access Management system • If you are an EP, you must have an active National Provider Identifier (NPI) and have a National Plan and Provider Enumeration System (NPPES) web user account. (I&A) web user account (User ID/Password) and be associated to the Eligible Professional's NPI. If you are working on behalf of an Eligible Professional(s) and do not have an I&A web user account, <u>Create a Login</u> in the I&A Use your NPPES user ID and password to log into this system. • If you are an EP who does not have an NPI and/or an account pavidate to NPPES ! to apply NPPES web user account, navigate to NPPES To app for an NPI and/or create an NPPES web user account. **Eligible Hospitals** • If you are an Eligible Hospital, you must have an active NPI. If you do not have an NPI, apply for an NPI in NPPES Users working on behalf of an Eligible Hospital(s) must Users working on behalf of an English Rospital(s) must have an Identity and Access Management system (IBA) web user account (User ID/Password) and be associated to an organization NPI. If you are working on behalf of an Eligible Hospital(s) and do not have an IBA web user account, Create a Login in the IBA System. Associated with both Eligible Professionals (EPs) and Eligible Hospitals If you are an EP using your NPPES web user account, you may also be permitted to work on behalf of a hospital. Navigate to the IBA System and use your NPPES User ID and password to request to work on behalf of an Users working on behalf of an Eligible Professional(s) may also work on behalf of an Eligible Hospital(s). An Identity and Access Management system (18A) web user account (User ID/Password) can be associated to both an Eligible Professional NPI and an organization NPI. If you organization. do not have an I&A web user account, Create a Login in **Account Management** If you are having issues with your User ID/Password and are unable to log in, please contact the EHR Incentive Program Information Center at 888-734-6433 / TTY: 888-• If you are an existing user and need to reset your password, visit the I&A System. 734-6563. (*) Red asterisk indicates a required field *User ID: View our <u>checklist of required materials</u> here. *Password: Web Policies & Important Links 🖵 Department of Health & Human Services CNIS! Accessibility 🗁 CMS.gov 🗁 File Formats and Plugins

Identity and Access Management (I&A)

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.





TIPS

Contact the PECOS Help Desk if you cannot remember your password - (866) 484-8049/ TTY (866)523-4759, 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**

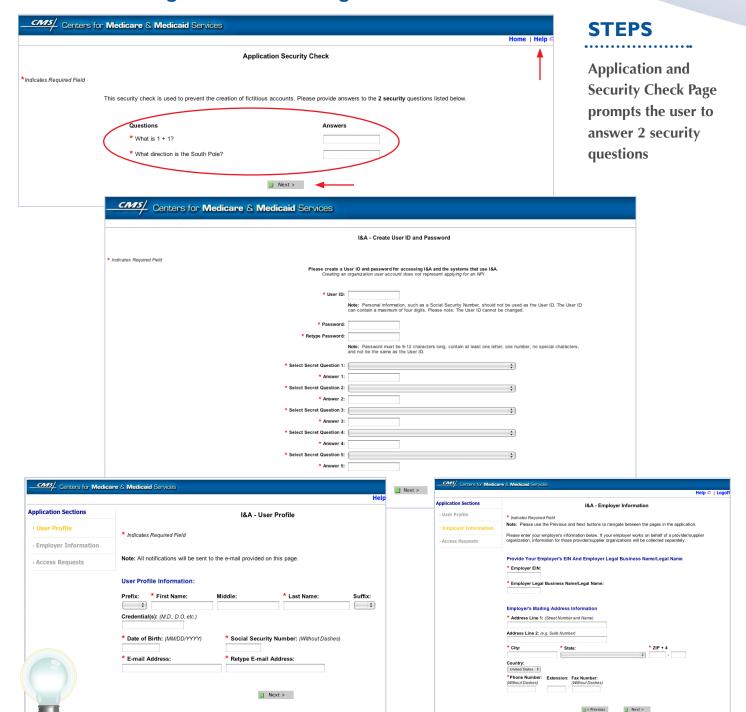
Click on the "Create a Login link" in the body of the screen

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**

Step 2 - Login (Continued)

Working on Behalf of an Eligible Professional

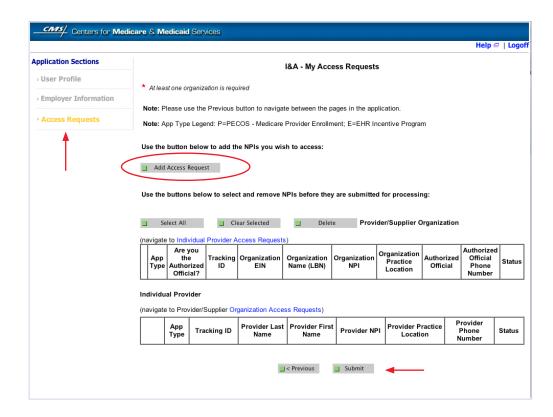


TIP Click on the HELP tab at the top of the screen for help creating your I&A user name and password User IDs cannot be changed. Once you have successfully created a User ID and Secret Question/Answer combinations and submitted the record, the User ID and Secret Question/Answer combinations will remain tied to your record and will not be changed

User name and password are case sensitive

Step 2 – Login (Continued)

Working on Behalf of an Eligible Professional



STEPS

Click on Access Requests

Click Add Access Request

Click Submit



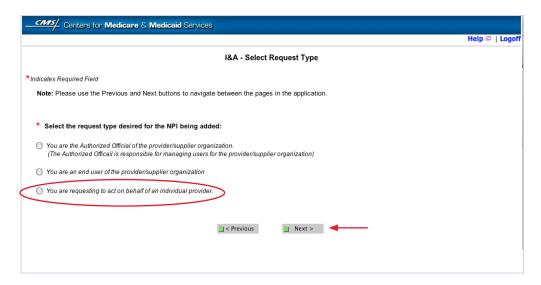
TIP At least one
NPI is required
to assign access

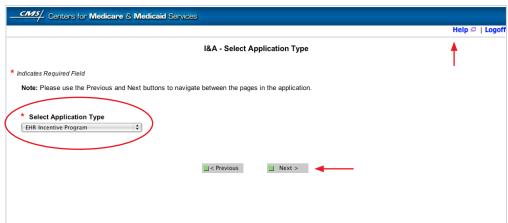
Use the Previous button to navigate between pages in the system

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

Step 2 - Login (Continued)

Working on Behalf of an Eligible Professional





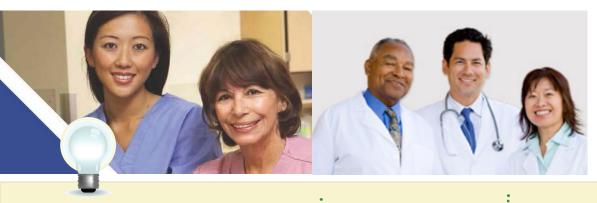
STEPS

Click on "You are requesting to act on behalf of an individual provider"

Click Next
Select Application Type

"EHR Incentive Program"

Click Next



TIPS

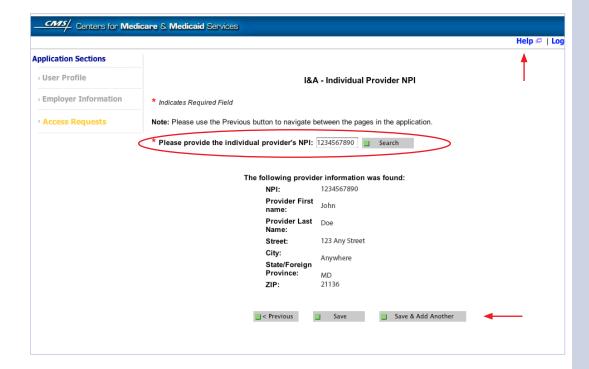
There can be only one Authorized Official per organization at any given time

Click on HELP for additional guidance to navigate the system

The Help link is on every page

Step 2 – Login (Continued)

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



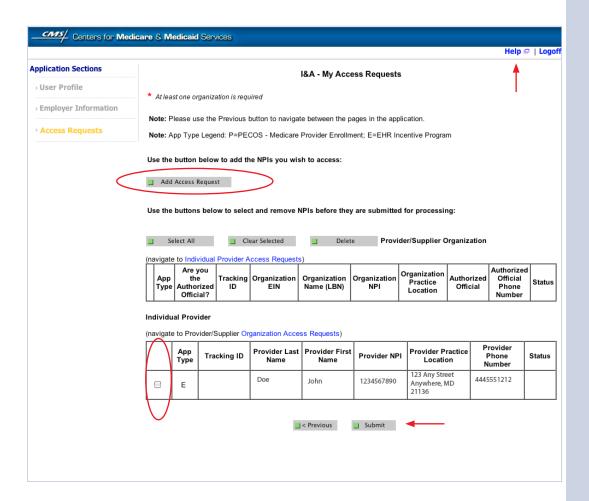
you back to the 'Select Application Type' page

Click on HELP for additional guidance to navigate the system

The Help link is on every page

Step 2 – Login (Continued)

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

Step 2 - Login (Continued)

Working on Behalf of an Eligible Professional



STEPS

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

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.

After you login, the system will alert you of your next step in the registration and attestation process, such as your registration needs to be completed, or that it is time to begin attestation.



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

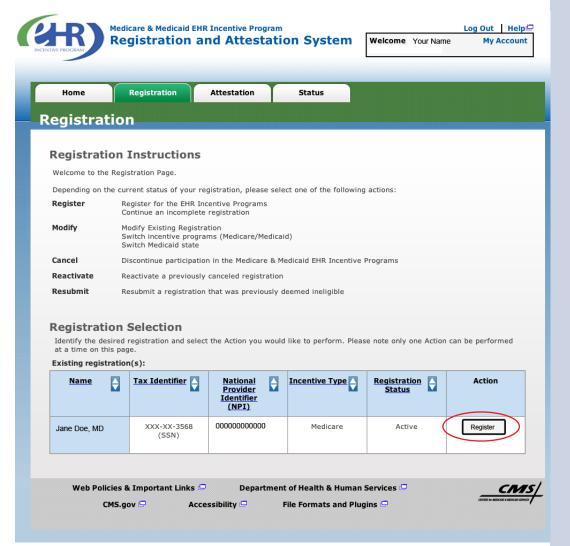
- 1. Home
- 2. Registration
- 3. Attestation
- 4. Status

Meaningful Use information:

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

Step 4 - Registration

Follow the registration instructions below.



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



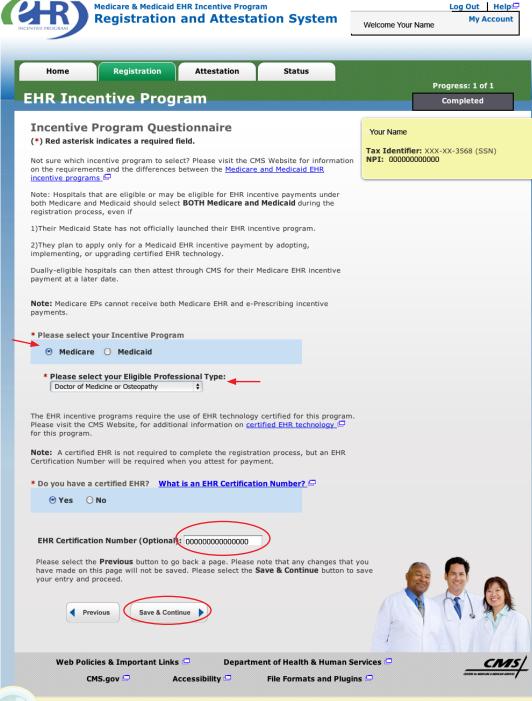
Data required for this registration is grouped into three topics. All three must be completed

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.





For the certified health IT product list visit; http://healthit.hhs.gov/CHPL

Use the instructions on the following pages to locate your CMS EHR Certification Number

Certification numbers are assigned by the Office of the National Coordinator

STEPS

Select Medicare

Select your Eligible Professional Type

Click Yes or No at "Do you have a certified EHR?" If yes, enter the EHR Certification Number if you have it. The number will be required at Attestation, but is not required at Registration.

Click Save & Continue

NOTE: If you are a **Medicare Advantage Eligible Professional you** may see this message: "Warning: You have been identified as a Medicare **Advantage Eligible Professional. This means** you are being claimed by a Medicare Advantage **Organization. You may** continue to register as a **Medicare Fee-for-Service Eligible Professional. Please** contact the Information Center if you have questions about being claimed by a Medicare Advantage Organization." **EHR Information Center:** 888-734-6433

STEPS

Select where your

Payee TIN Type

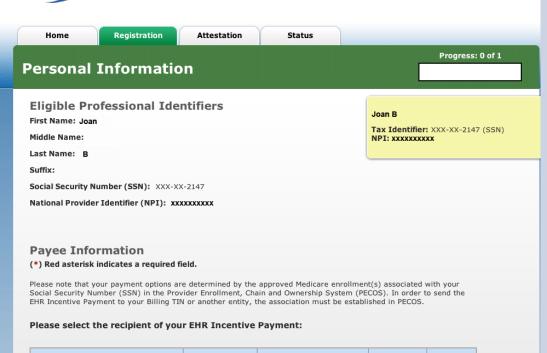
payment will go in the

Step 7 - Personal Information

Follow the instructions below regarding your personal information.



My Account | Log Out | Help⊡ Welcome Joan B



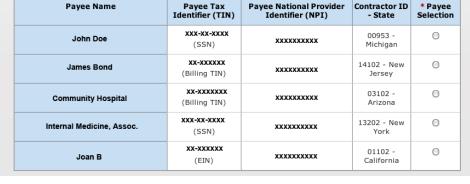
SSN Payee TIN Type
indicates that the
provider receives the
payment. Select SSN
Payee Type only if the
EP receives Medicare
payments to their SSN

EIN Payee TIN
Type indicates the
group receives the
payment.(Choose
Group Name if
selecting EIN)

Click APPLY

Enter Group Payee NPI

Click Save & Continue



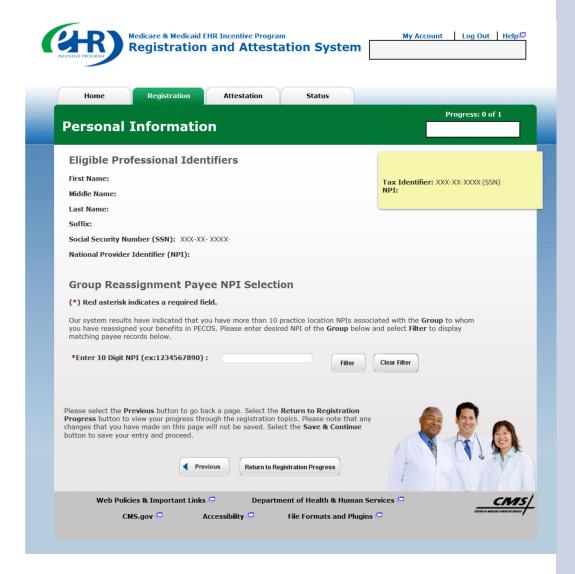


IPS The EP can only receive the payment themselves if they have not reassigned all of their Medicare benefits to another entity in PECOS.

Medicare EPs can elect to have their payment go to another entity by selecting Payee TIN Type of EIN. (Choosing this option will activate a list of entities list that the EP reassigned Medicare benefits to in PECOS).

Step 7 - Personal Information for Groups

If a group will be receiving payments, follow the instructions below regarding your group information.



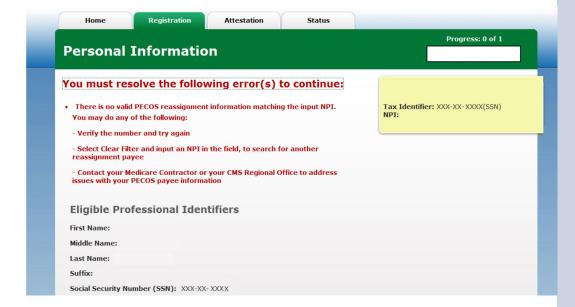
STEPS

If you are assigning payments to a practice or group, you will need to enter the group's 10-digit NPI that will be receiving the payments.

Click Filter

Step 7 - Resolve Personal Information Errors

Resolve any errors with your personal information.

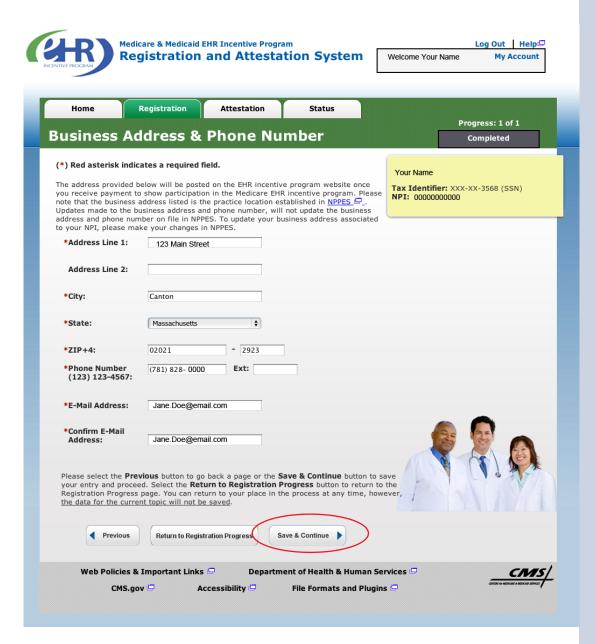


STEPS

If there are any errors with your personal information, the system will alert you and allow you to make revisions. Resolve any issues and continue.

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. However, the data is not sent back to NPPES

This is the information that will be posted on the EHR Incentive Program website once you receive payment The business address cannot be a P.O. Box address.

Step 9 – Registration Process

Be sure to complete all the topics below.



STEPS

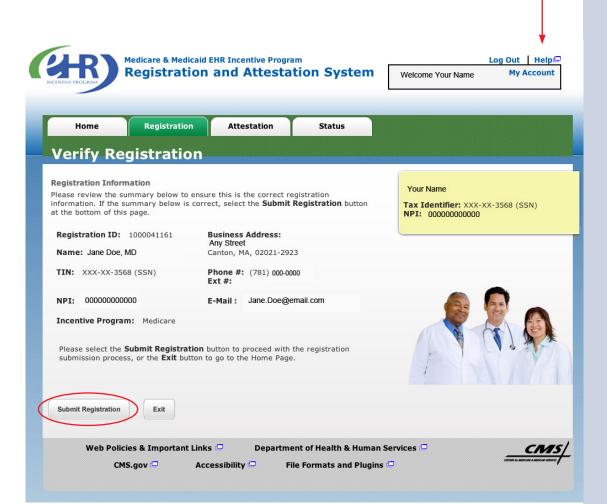
Click on Proceed with Submission to continue the registration process



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



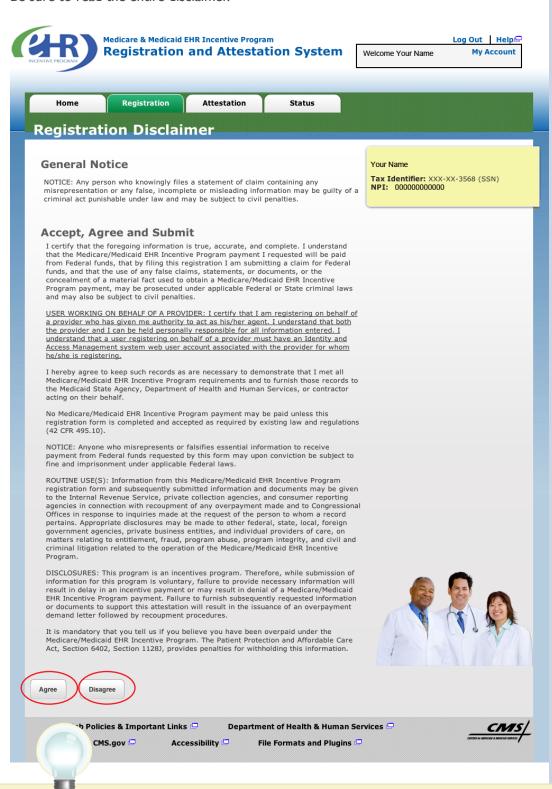
TIPS

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.

TIP

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

This completes your registration

Select the *Print Receipt* button to print this page

You will receive an e-mail email notification from this registration

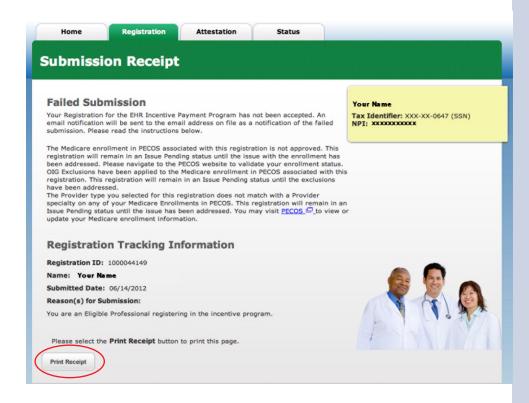


TIPS

You must submit your Attestation information to qualify for the EHR incentive payment

If you are deemed a hospital-based provider you will receive a warning stating; Warning: For your Registration, you have been identified as hospital-based for the current year. Please note that your hospital based status is checked yearly and may differ based on your EHR Reporting Period during Attestation

Step 13 - Submission Receipt (Failed Submission)



STEPS

Your registration has failed.

Read the instructions on the screen and contact the appropriate department to correct your information.

Print the receipt for your records

The following are reasons that a submission failed with contact information:

Reason(s) for Rejected status:

 Death Master File (DMF) (Medicare/Medicaid) validation failed – The provider's Legal Name and Social Security Number are on the Social Security Administration's DMF. Contact Social Security office, (800) 772-1213 / TTY (800)325-0778.

Reason(s) for Issue Pending status:

- NPI Status in NPPES is in a Deactivated status. Contact the NPPES Help Desk for assistance. Visit; https://nppes.cms.hhs.gov/NPPES/Welcome.do (800) 465-3203 / TTY (800) 692-2326
- Enrollment Status in PECOS The Medicare enrollment in PECOS associated with this registration is not in an Approved status. Contact PECOS for help. Visit; https://pecos.cms.hhs.gov/, (866)484-8049 / TTY (866)523-4759
- OIG Exclusions in PECOS OIG Exclusions are associated with this provider's Medicare enrollment in PECOS. Contact PECOS for help. Visit; https://pecos.cms.hhs.gov/, (866)484-8049 / TTY (866) 523-4759
- Hospital-based Professional You have been identified as a Hospital-based Eligible Professional in the CMS National Level Repository (NLR). A Hospital-based Professional is defined as one who furnishes ninety percent (90%) or more of his/ her allowed services in an inpatient hospital setting. This year you are not eligible to participate in the EHR incentive program.



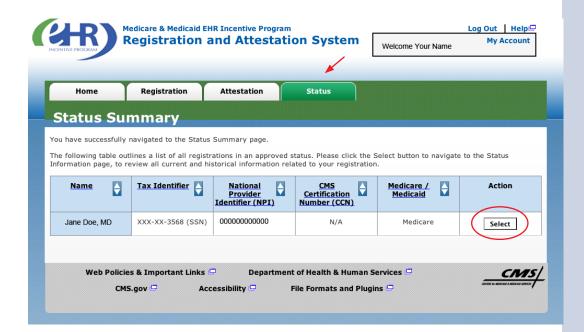
TIPS

If any of the system validations fail, the registration will be set to a status of 'Rejected' or 'Issue Pending'.

A registration ID number will be assigned to your submission

Step 13 - Status Summary

Review all current and previous information related to your account.



STEPS

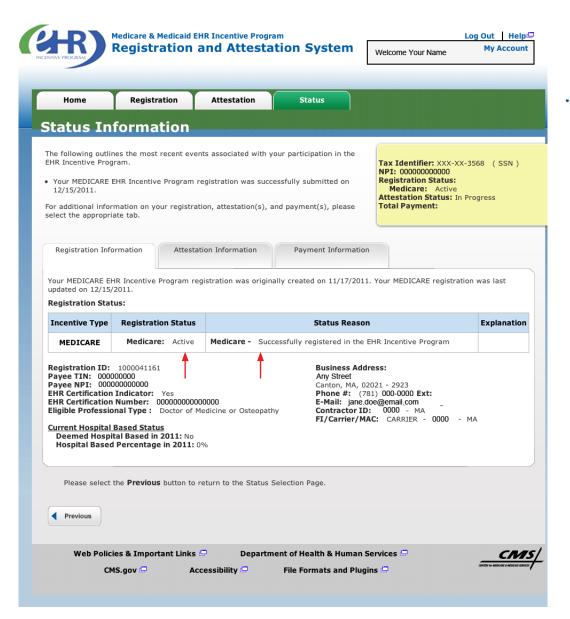
Click the *Status tab* to view your registration information



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 Active when all validations pass

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.



Help **Topics** Help provides additional guidance to users for Medicare & Medicaid EHR Incentive Program Registration & Attestation process. Help is broken up into the following sections. **About Registration & Attestation System** Presents an overview of the system, processes, and benefits. How to get Access to the Registration & Attestation System Presents summary information on accessing Internet-based Registration & Attestation System **User Accounts** Presents additional information regarding account information. **Accessibility** Presents information about the accessibility and compatibility features of Internetbased Registration & Attestation System. Frequently Asked Questions (FAQs) Presents a list of common questions and their answers regarding the use of Internet-based Registration & Attestation System and the Medicare\Medicaid registration and attestation process. **Glossary and Acronym List** Presents Medicare\Medicaid EHR terms and definitions **Contact Information** Presents a list of contact information for Internet-based Registration & Attestation System user account issues Exit

STEPS

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

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
- PECOS Help Desk for assistance.
 Visit; https://pecos.cms.hhs.gov/
 (866)484-8049 / TTY (866)523-4759



TIP EHR Incentive Program; visit:

http://www.cms.gov/EHRIncentivePrograms/

Acronym Translation

CMS Centers for Medicaid & Medicaid Services **DMF** Social Security Death Master File **EHR** Electronic Health Record Employer's Identification Number EIN **EIPIC** EHR Incentive Program Information Center EP Eligible Professional FΙ Fiscal Intermediary **FOHC** Federally Qualified Health Center I&A **Identification & Authentication System IDR Integrated Data Repository** LBN Legal Business Name MAC Medicaid Administrative Contractor MAO Medicaid Advantage Organization NPI **National Provider Identifier NPPES** National Plan and Provider Enumeration System National Level Repository NLR OIG Office of the Inspector General **PECOS** Provider Enrollment Chain and Ownership System **RHC** Rural Health Center SSN Social Security Number TIN Tax Identification Number

ACRONYMS

