REGISTRATION USER GUIDE

For Eligible Professionals

Medicaid Electronic Health Record (EHR) Incentive Program

JUNE 2013

(07.13.13 ver6)

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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***

https://ehrincentives.cms.gov

Step 1 – 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.

STEPS

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

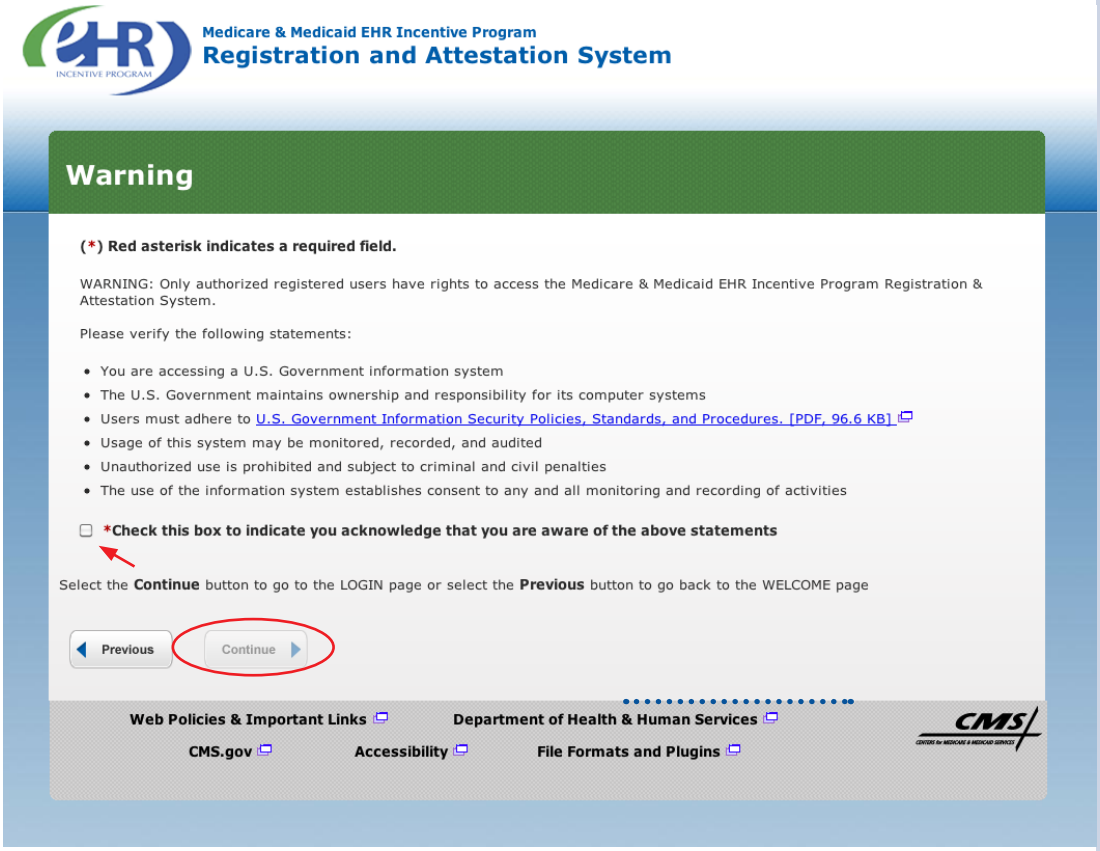
Click *Continue* to start the registration process

TIP

*To determine your eligibility, click on the **CMS website***

Step 1 - 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*

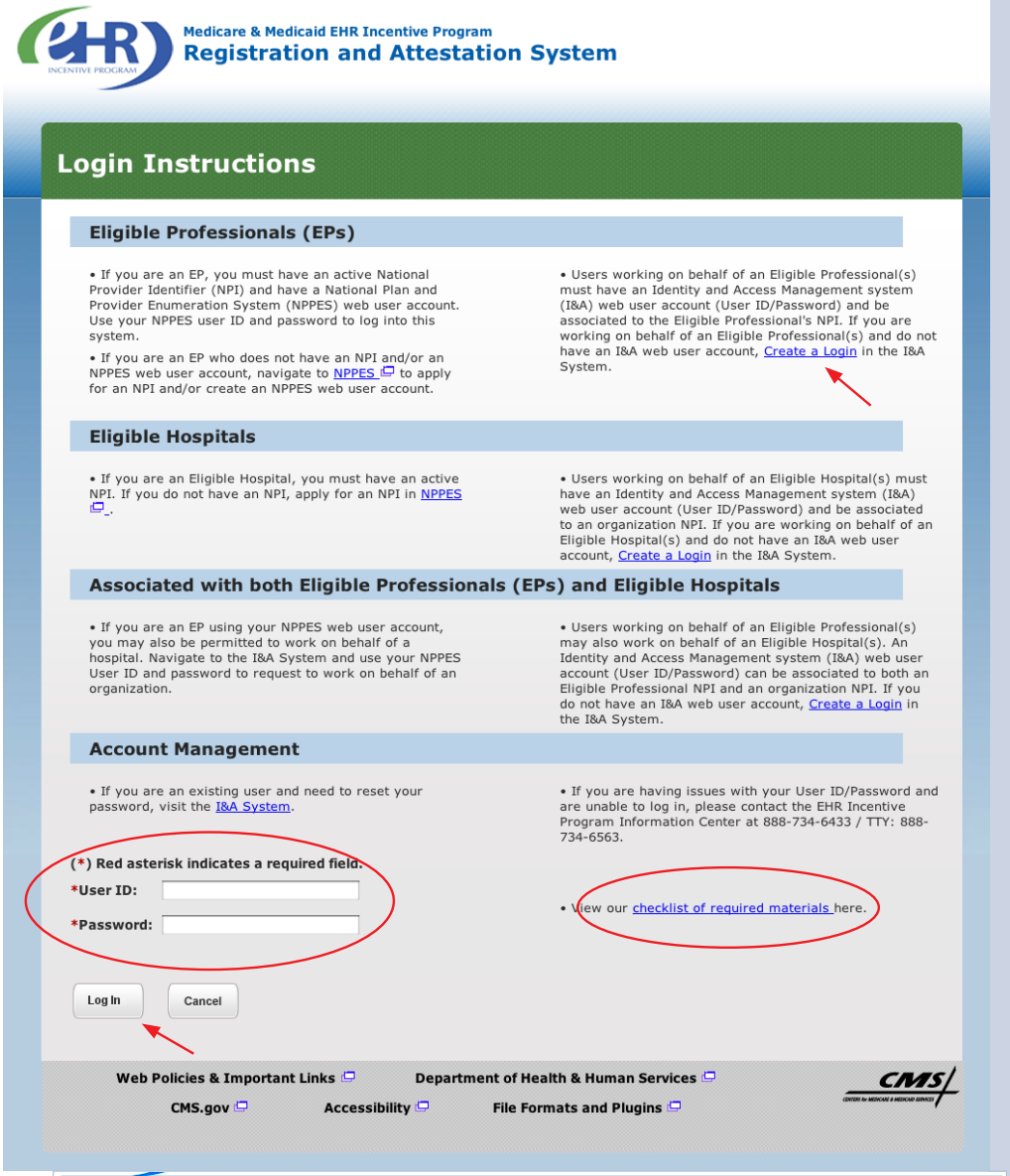
TIP

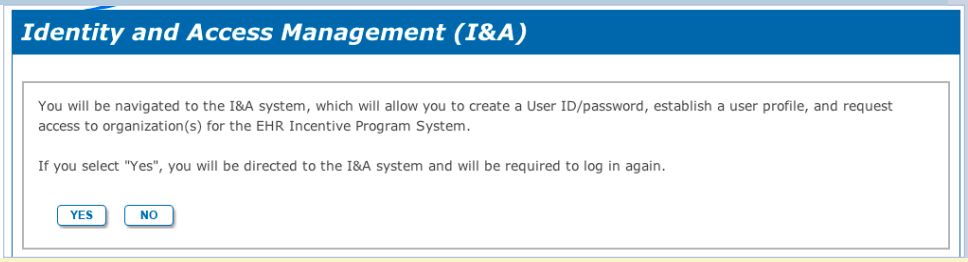
Eligible Professionals (EPs) may not be hospital based. This is defined as EPs seeing 90% or more of their Medicare covered services in:

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

Step 2 – Login

Review the Login Instructions for Eligible Professionals.





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

TIPS

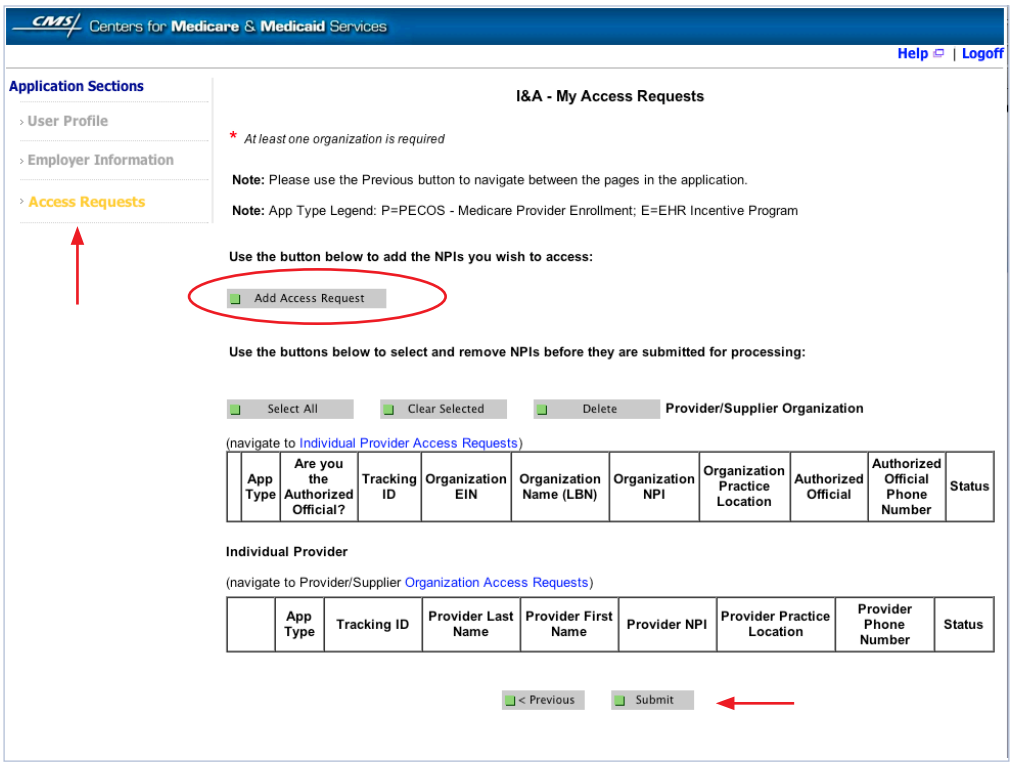
Contact the PECOS Help Desk if you cannot remember your password - (866) 484-8049/ TTY (866)523-4759, ***https://pecos.cms.hhs.gov***

To locate your NPI number, visit: ***https://nppes.cms.hhs.gov/NPPES/NPIRegistryHome.do***

User name and password are case sensitive

Step 2 – Login (Continued)

Working on Behalf of an Eligible Professional



STEPS

Click on Access Requests

Click Add Access Request

Click **Submit**

TIP

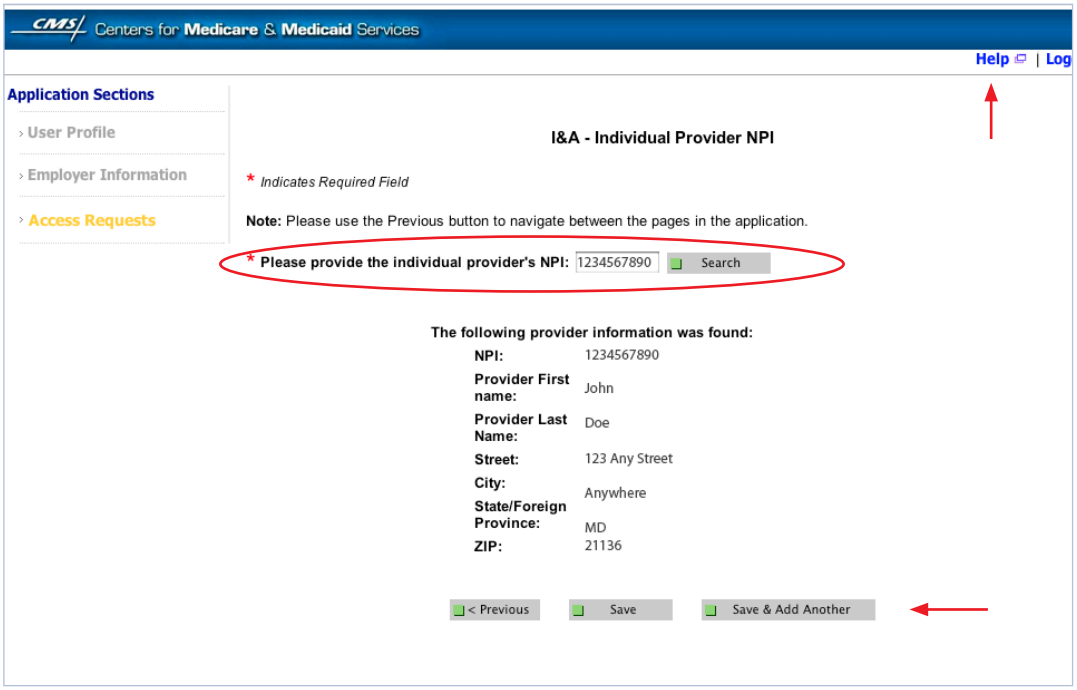
At least one NPI is required to assign access

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

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"'

Or

Click **Save & Add Another** to add multiple providers

TIP

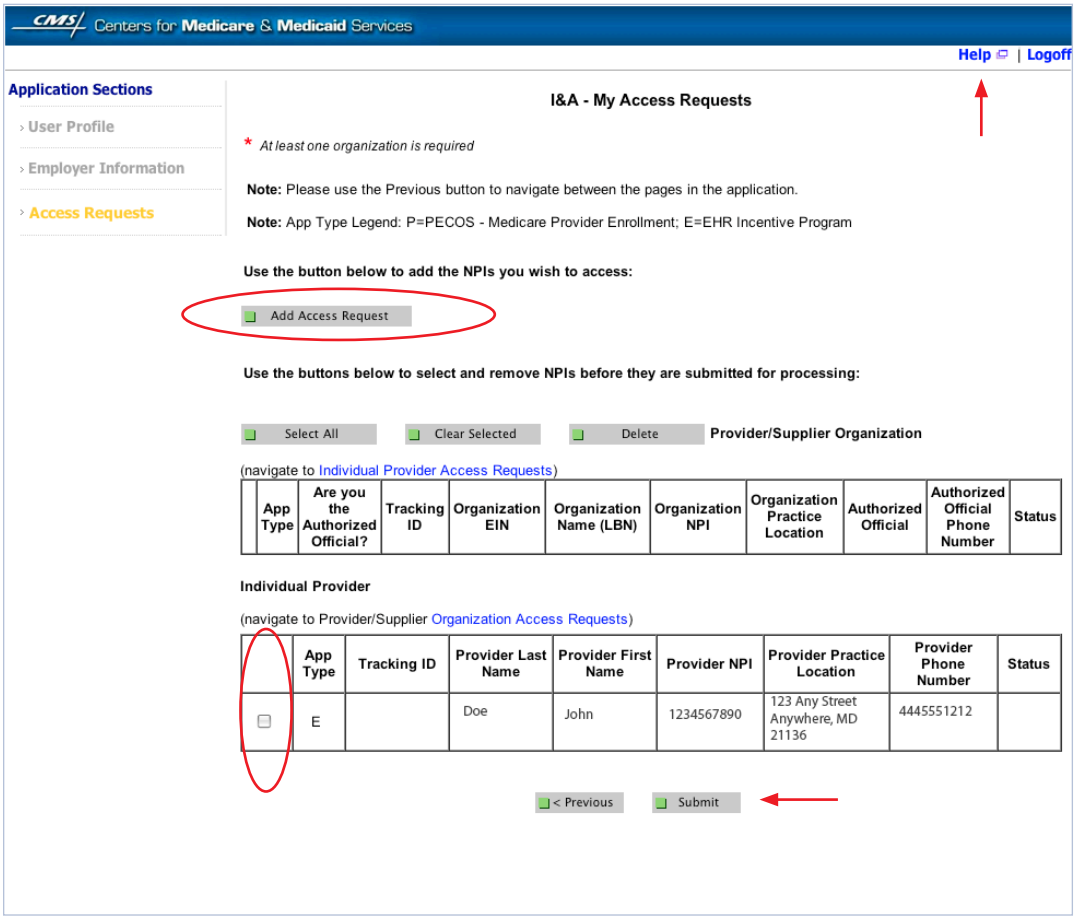
Clicking Previous will take you back to the 'Select Application Type' page

Click on HELP for additional guidance to navigate the system

The Help link is on every page

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

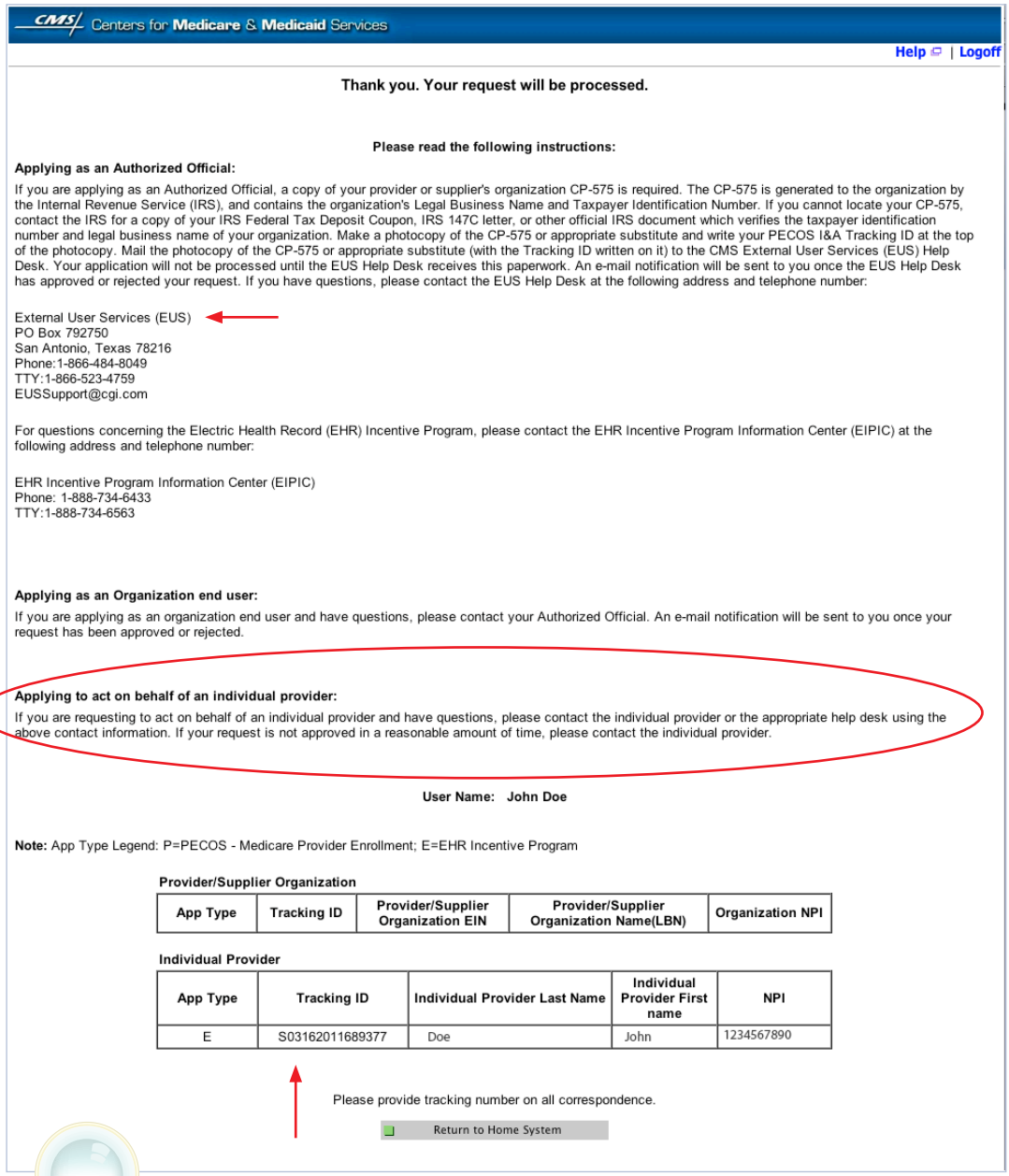
Clicking Previous will take you back to the 'Select Application Type' page

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



CMS Centers for Medicare & Medicaid Services

Help | Logoff

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

App Type	Tracking ID	Individual Provider Last Name	Individual Provider First name	NPI
E	S03162011689377	Doe	John	1234567890

Please provide tracking number on all correspondence.

Return to Home System

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

TIPS

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

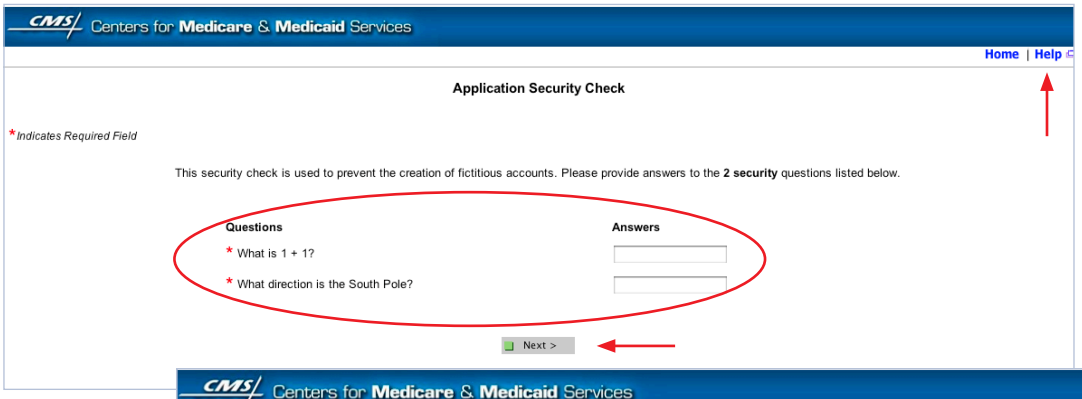
A proxy user may only register and attest for 1,000 eligible professionals

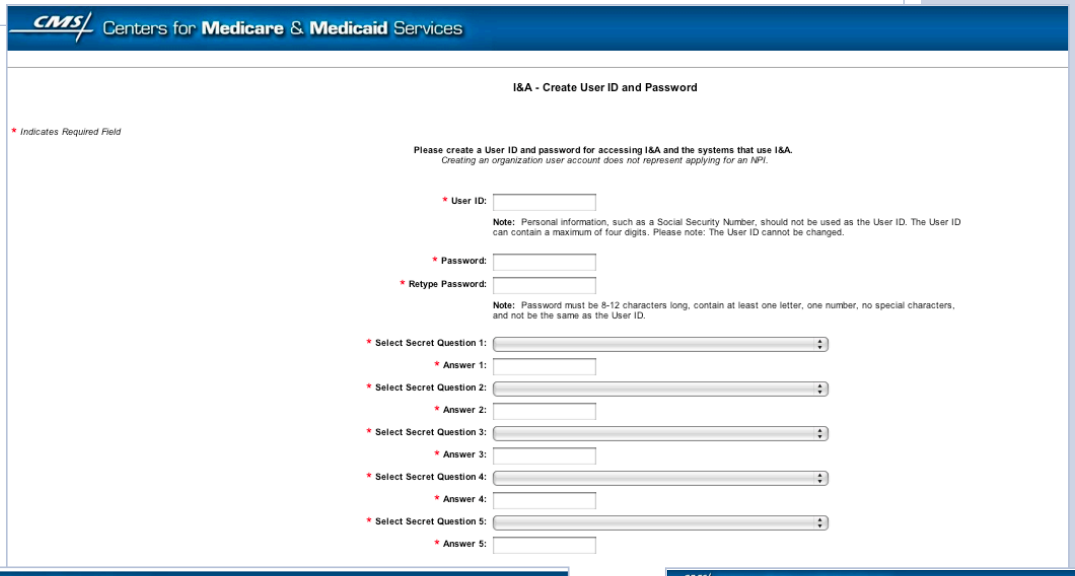
For questions regarding the EHR Incentive Program –

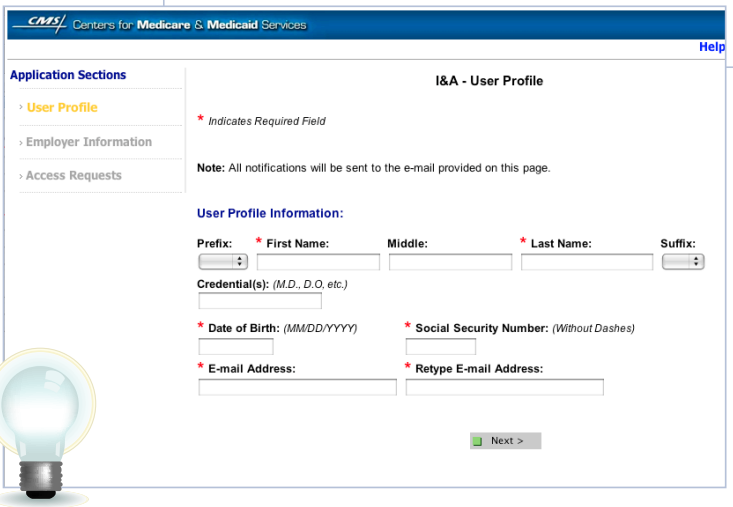
EHR Information Center
1-888-734-6433
TTY/1/888-734-6563

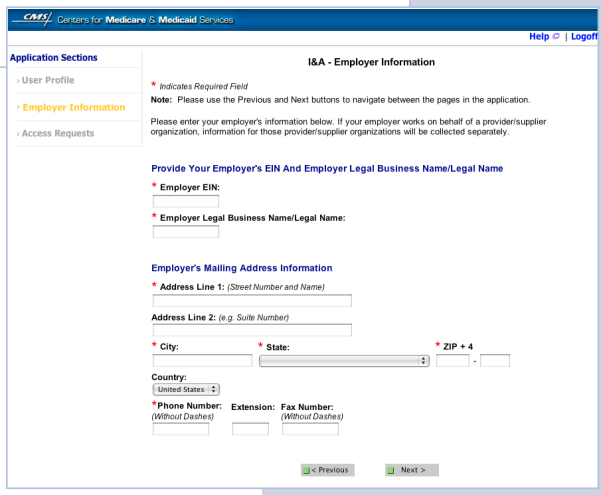
Step 2 – Login (Continued)

Working on Behalf of an Eligible Professional









STEPS

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

TIPS

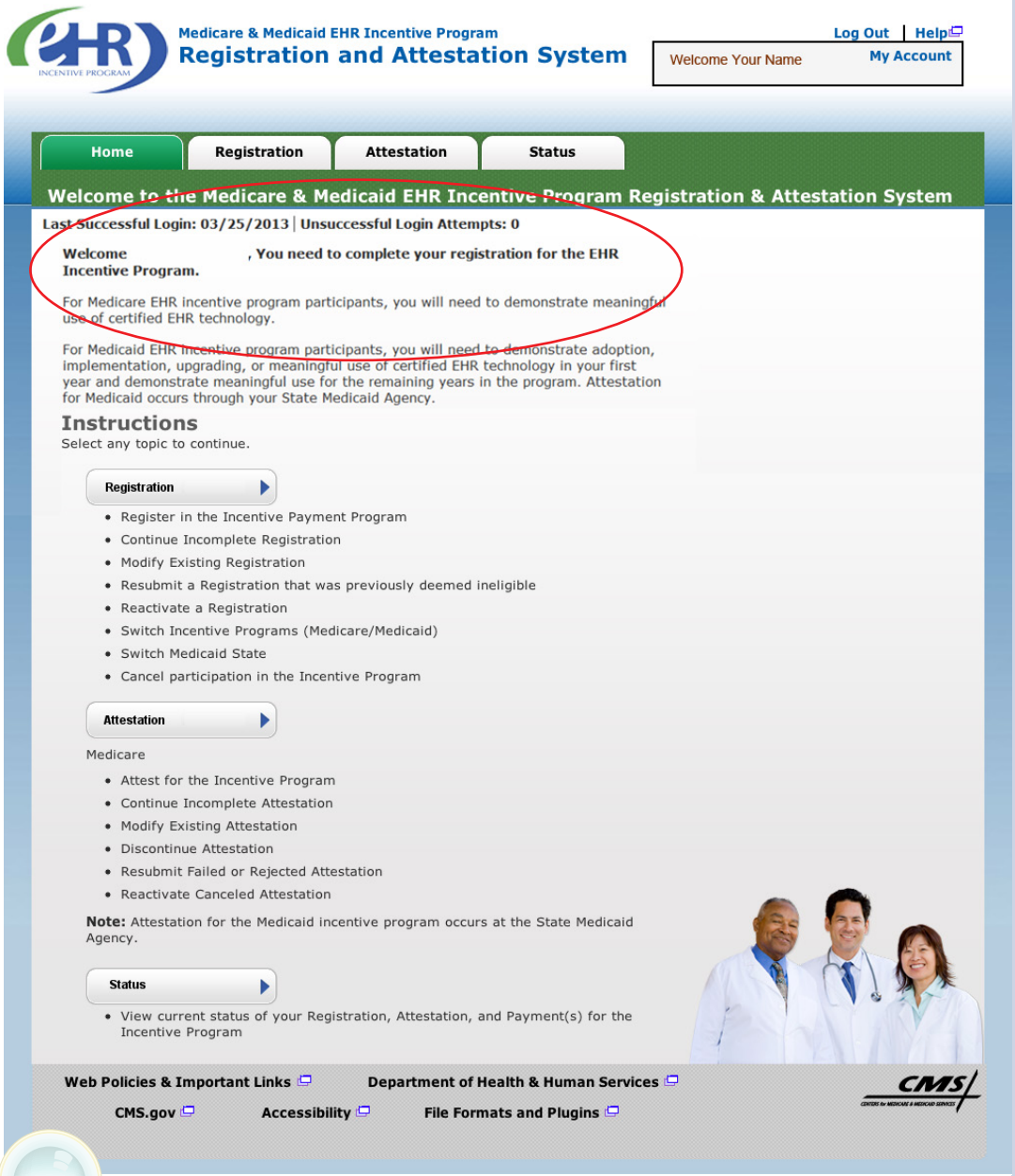
Click on the HELP tab at the top of the screen for help creating your I&A user name and password

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

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.

TIPS

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

STEPS

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

TIPS

"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

TIPS

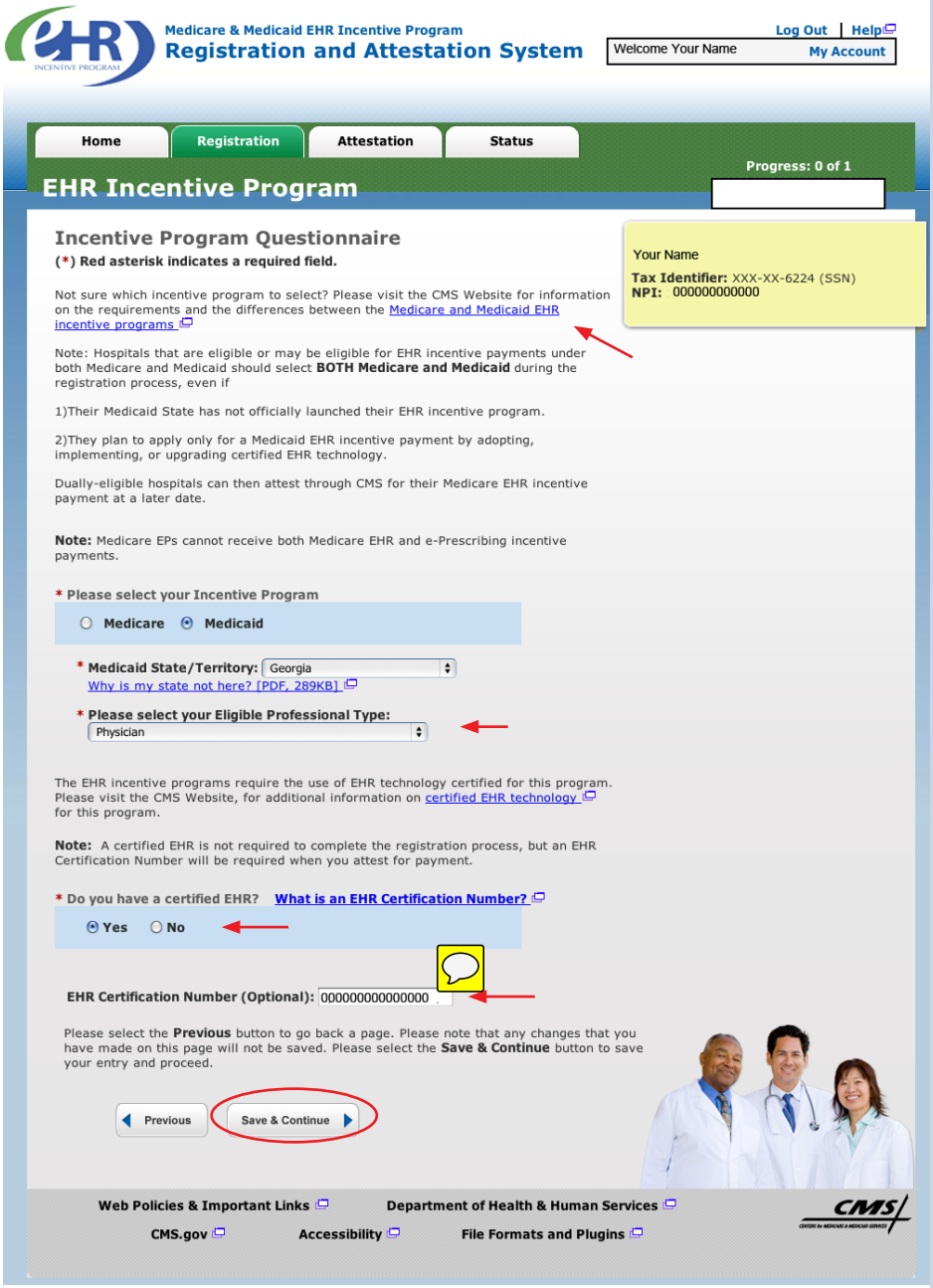
*Data required for this registration is grouped into three topics. All three must be **completed***

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/***

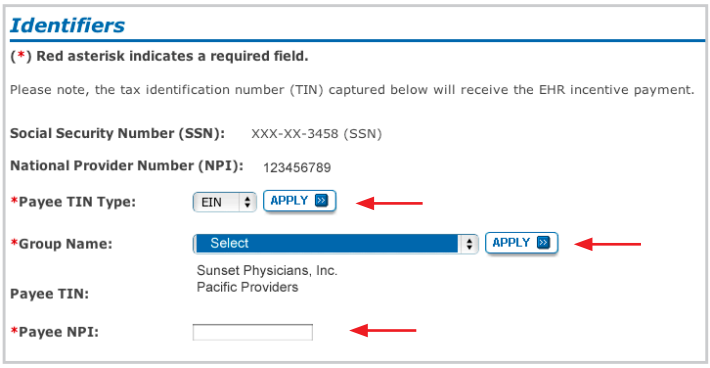
Click on the CMS EHR Certification Number website to obtain your certified EHR number. ***http://healthit.hhs.gov/CHPL***

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.



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*

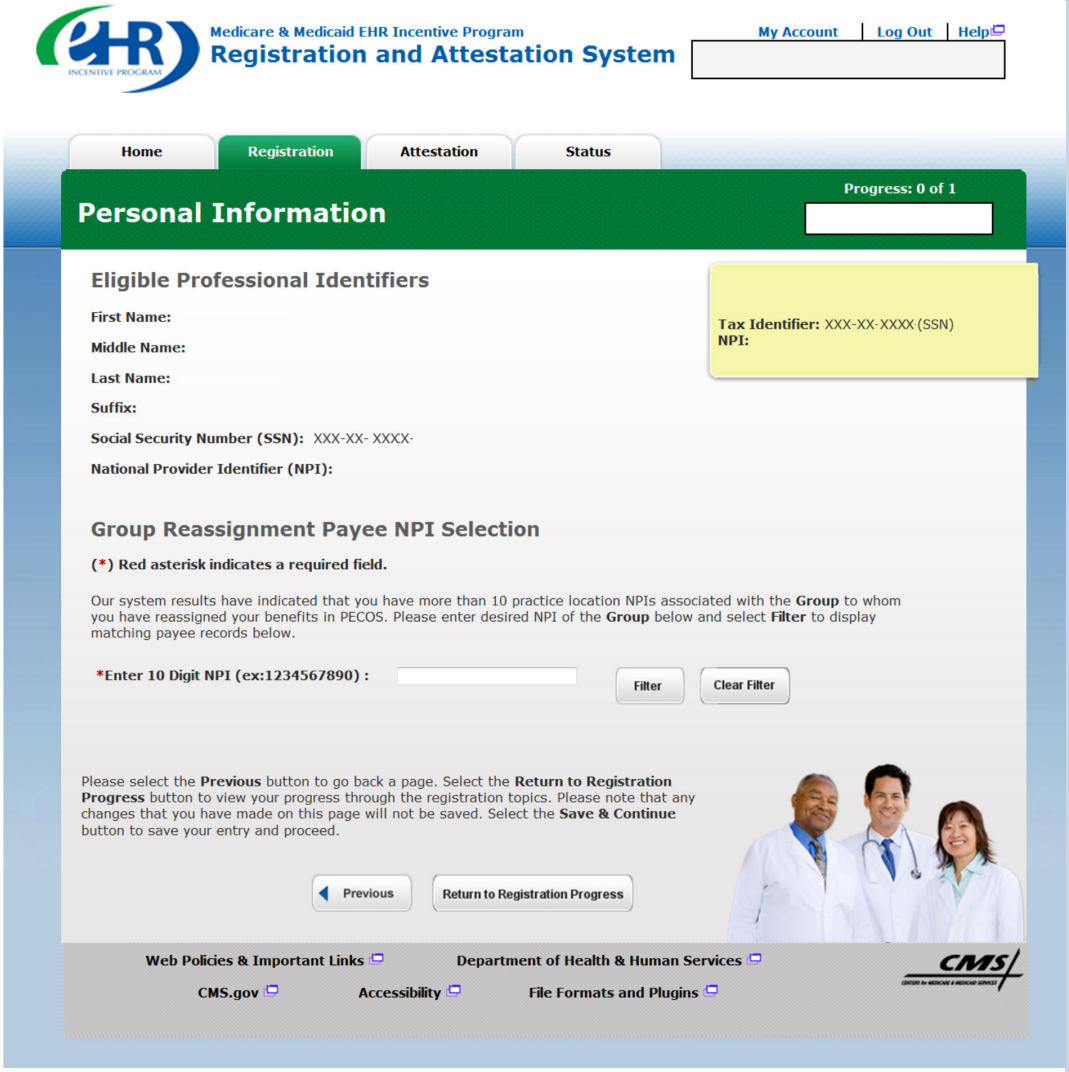
TIPS

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

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

Step 7 – Personal Information for Groups

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



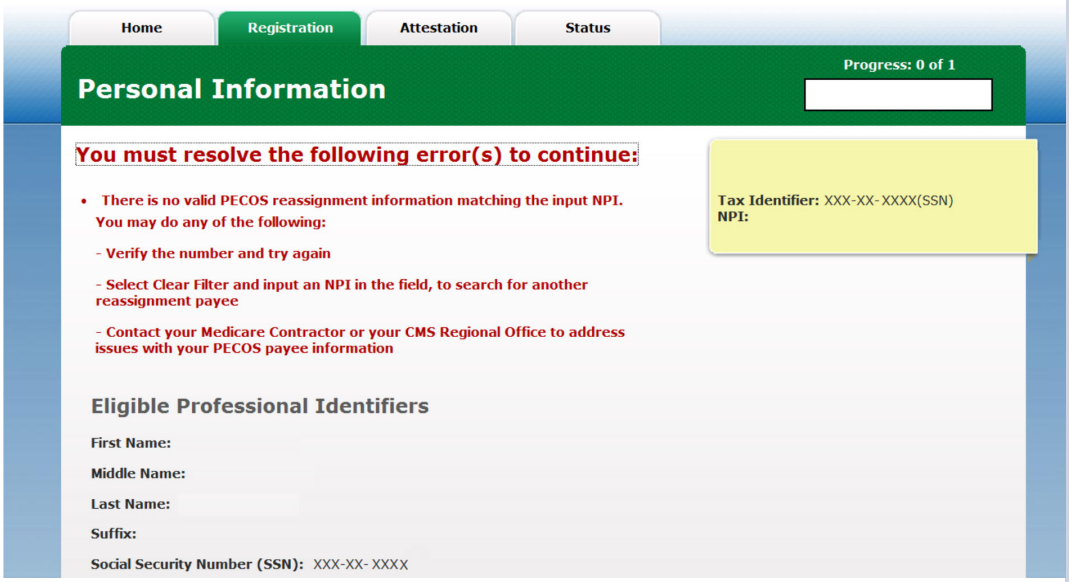
STEPS

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.

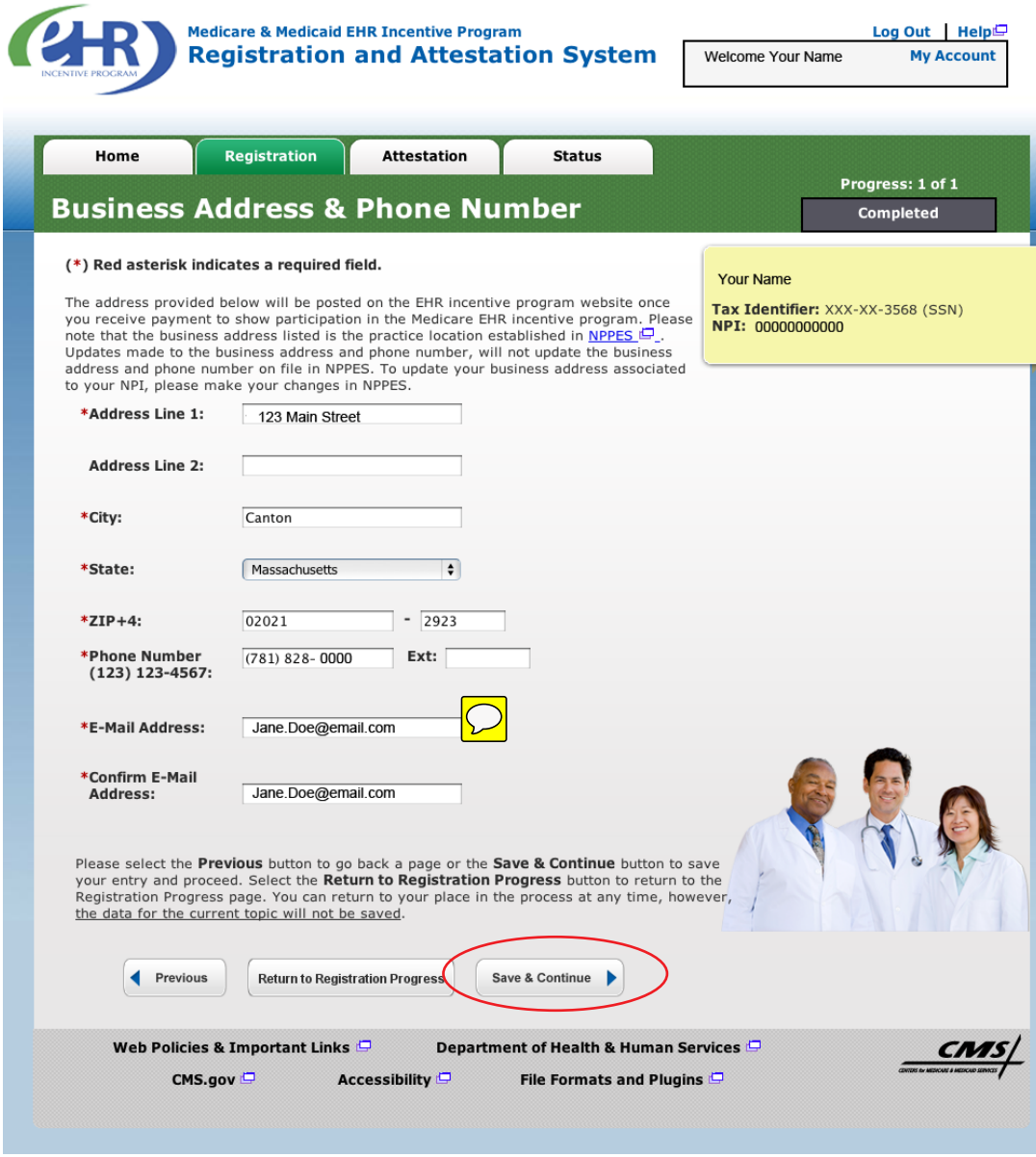


STEPS

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

TIPS

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

Be sure to complete all the topics below.

STEPS

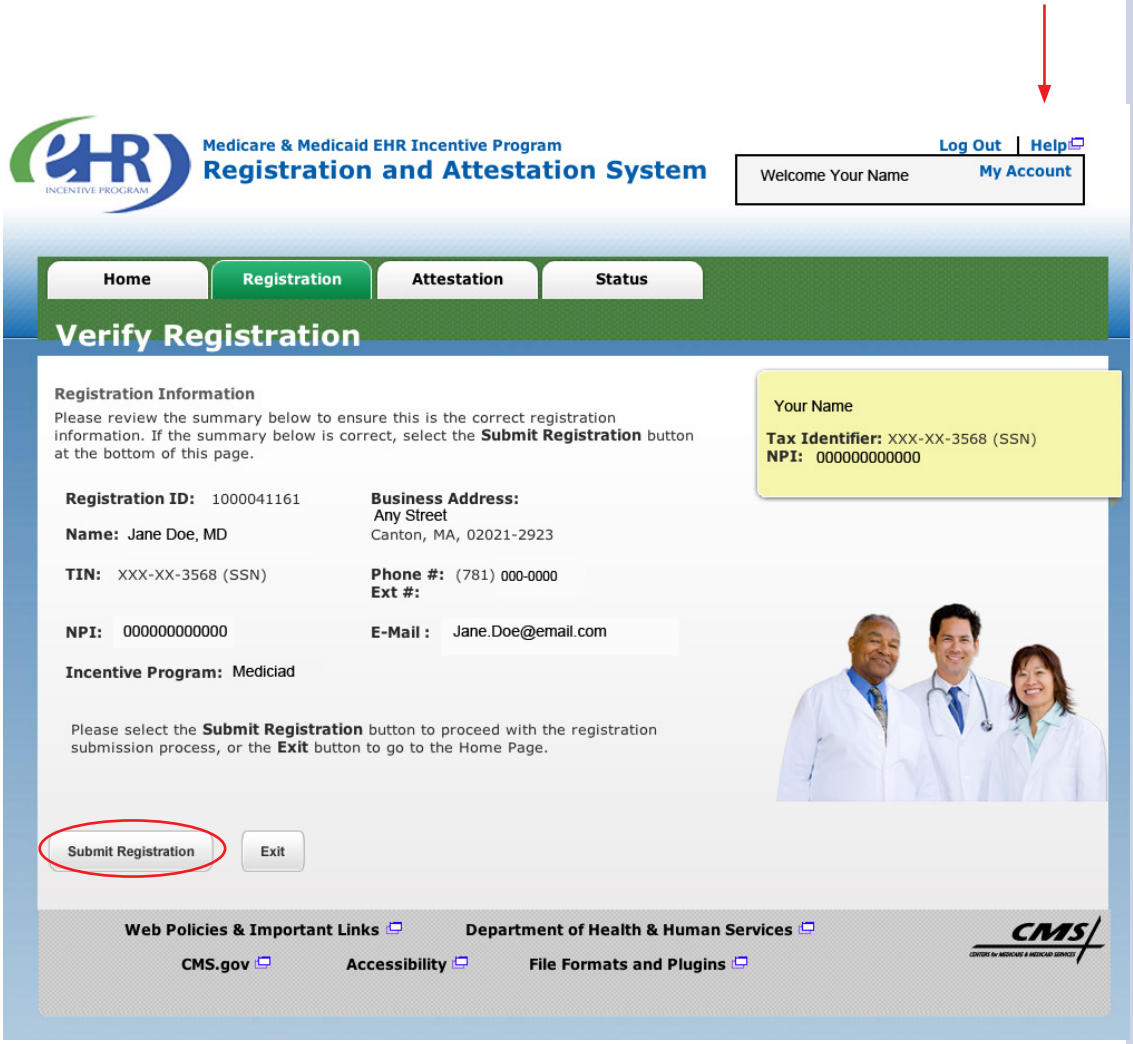
Click on ***Proceed with Submission*** to continue the registration process

TIP

*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 11 – Registration Disclaimer

Be sure to read the entire disclaimer.

STEPS

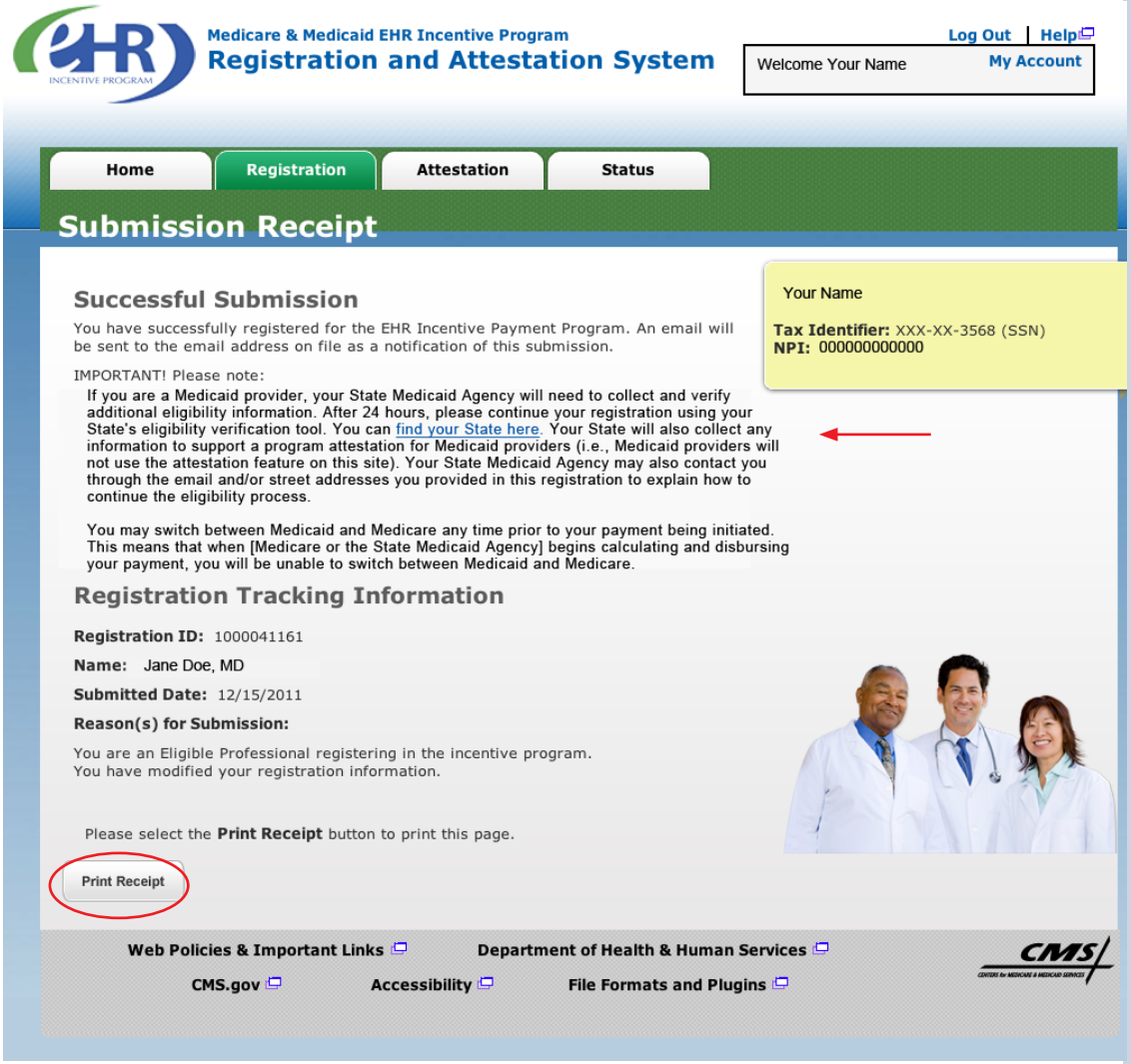
Read the disclaimer and click on *Agree* or *Disagree* at the bottom of the page.

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

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

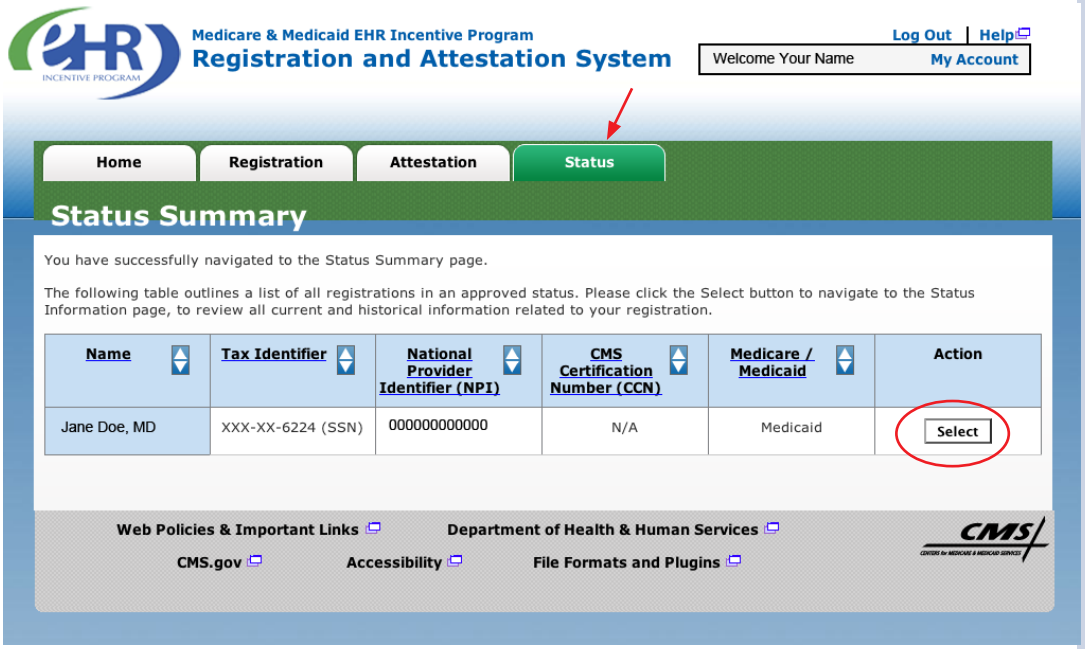
TIPS

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

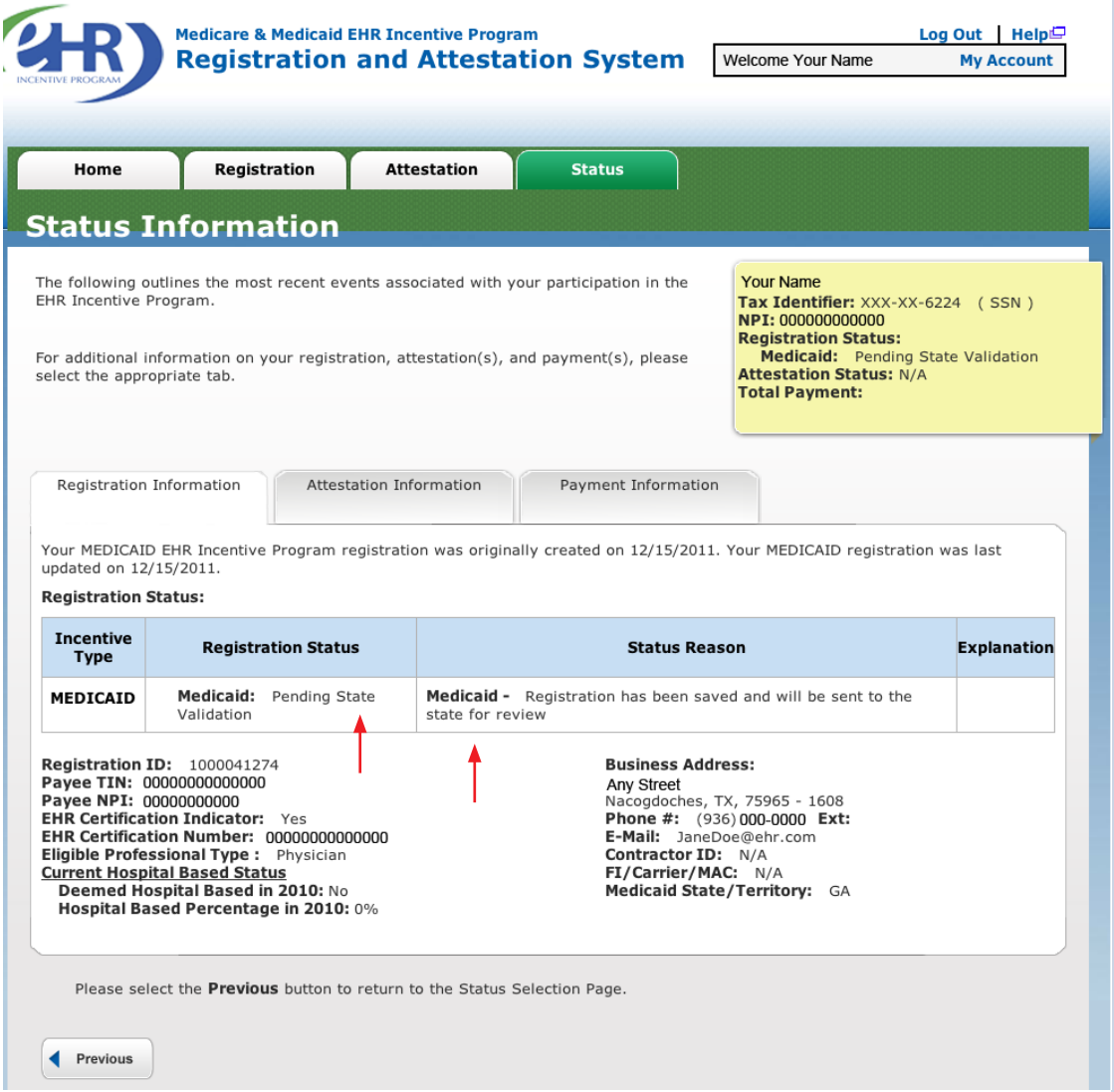
Click the *Status* tab to view registration information

TIP

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

TIPS

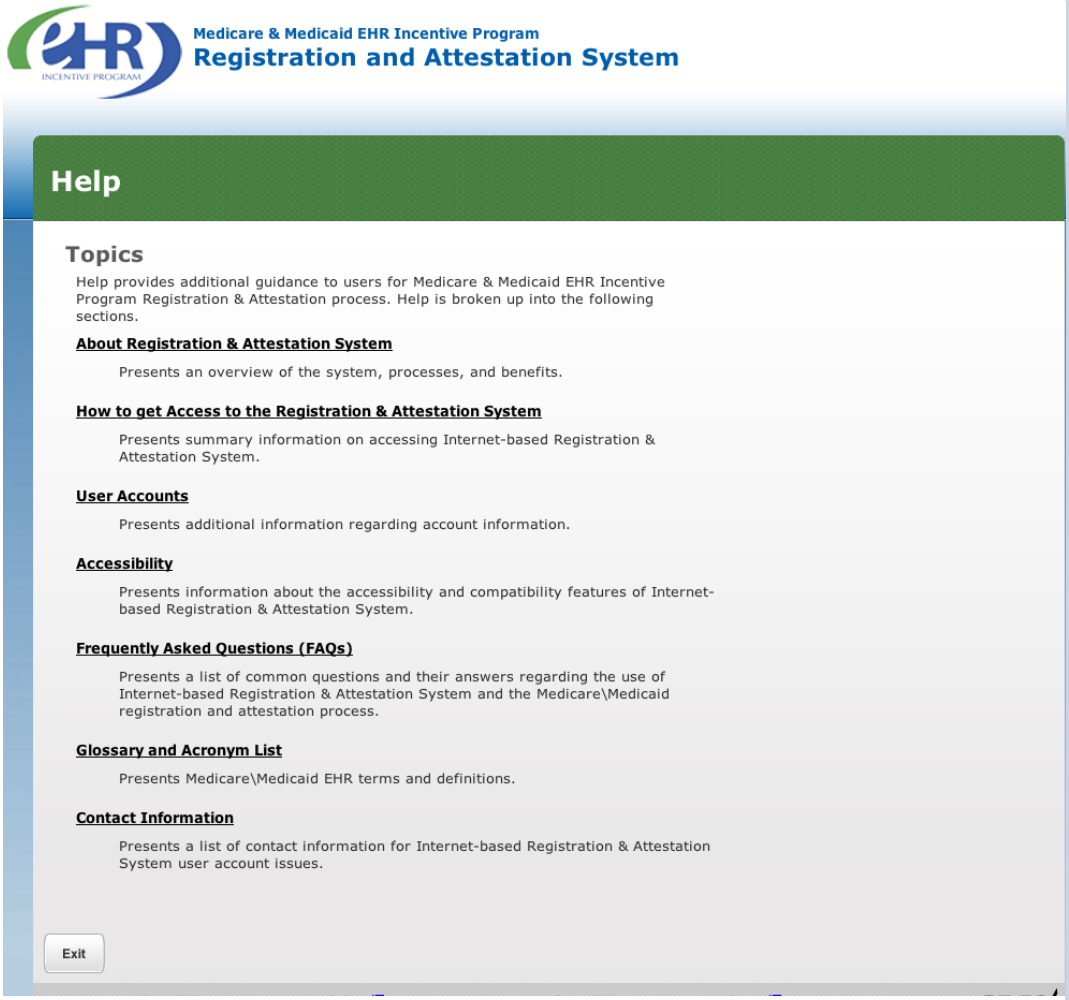
Registration status will read "Medicaid: Pending State Validation" until the registration process is completed by the State

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.



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

TIP

EHR Incentive Program; visit ***https://www.cms.gov/EHRIncentivePrograms/***

ACRONYMS

Acronym Translation

CMS	Centers for Medicaid & Medicaid Services
DMF	Social Security Death Master File
EH	Eligible Hospital
EHR	Electronic Health Record
EIN	Employer's Identification Number
EIPIC	EHR Incentive Program Information Center
EP	Eligible Professional
FI	Fiscal Intermediary
FQHC	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
NLR	National Level Repository
OIG	Office of the Inspector General
RHC	Rural Health Center
SSN	Social Security Number
TIN	Tax Identification Number

Register for CMS
Electronic Health Record Incentives
Click Here