CMS
CENTERS for MEDICARE & MEDICAID SERVICES

# REGISTRATION USER GUIDE

For Eligible Hospitals

# Medicare and Medicaid Electronic Health Record (EHR) Incentive Program

**JULY 2012**
**(07.02.12 ver5)**

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## Disclaimer

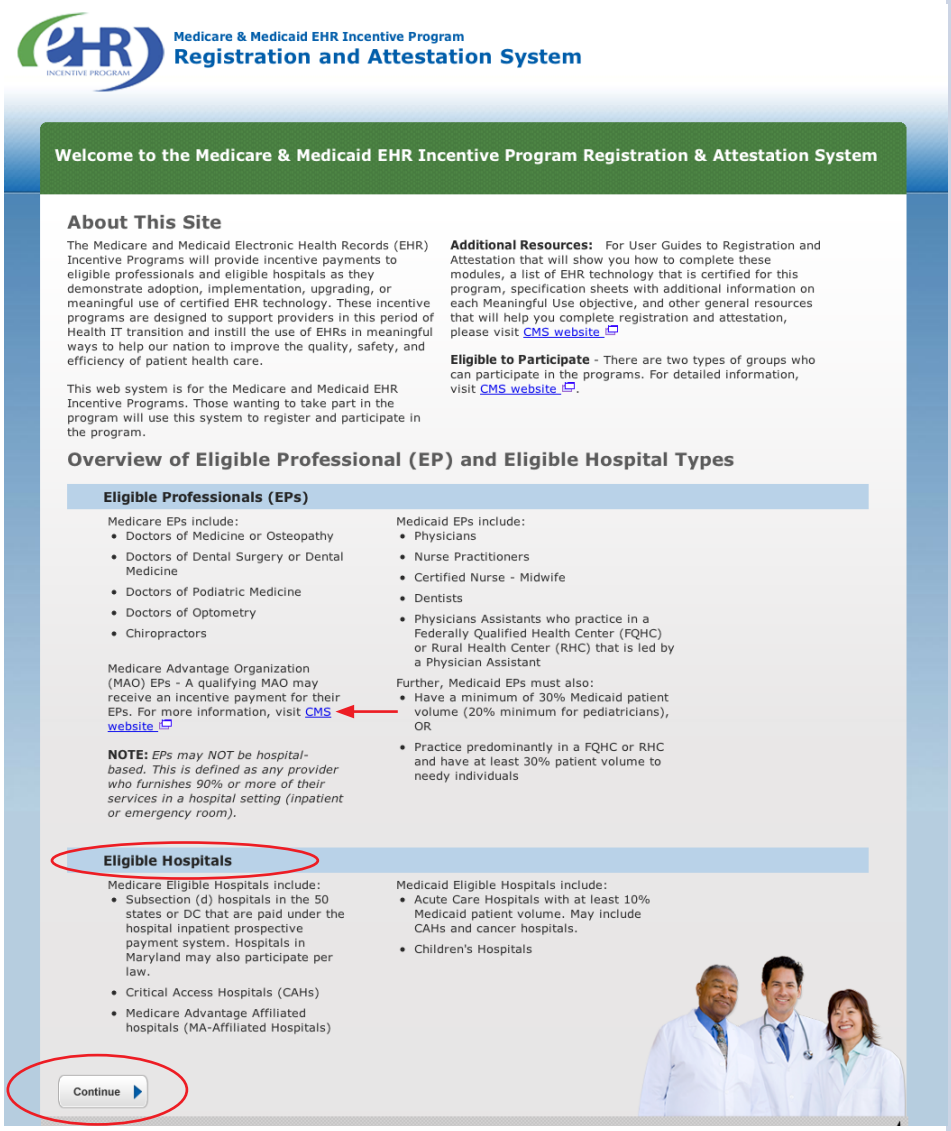
The Centers for Medicare & Medicaid Services (CMS) is providing this material as an informational reference for physicians and non-physician practitioners-providers. Although every reasonable effort has been made to assure the accuracy of the information within these pages at the time of posting, the Medicare 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.***

*https://ehrincentives.cms.gov*

## Step 1 – Getting Started

This is a step-by-step guide for the Medicare and Medicaid Eligible Hospitals 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 at the bottom. 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**

### TIPS

*If you are a hospital that meets all of the following qualifications, you are 'dually-eligible' for the Medicare and Medicaid EHR Incentive Programs:*

- *You are a sub-section(d) hospital in the 50 U.S. States or the District of Columbia or CAH; and*
- *You have a CMS Certification Number ending in 0001-0879 or 1300-1399; and*
- *You have at least 10% Medicaid patient volume.*

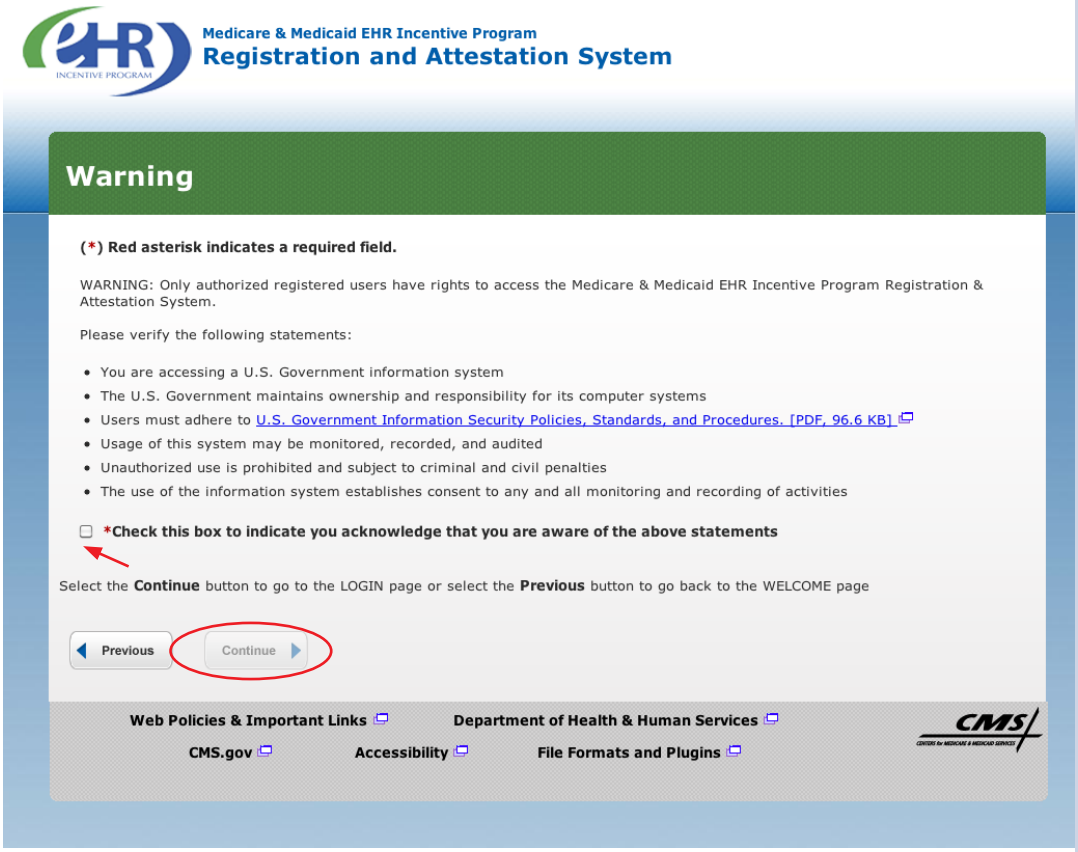
*You must register for 'Both Medicare & Medicaid' when registering for the program. If your state's program is not ready to accept your registration, your file will be placed into a 'pending status' until your state's program is launched.*

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

*For a list of Eligible Hospitals (EHs), click on the plus sign next to Eligible Hospitals.*

## Step 1 - (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*

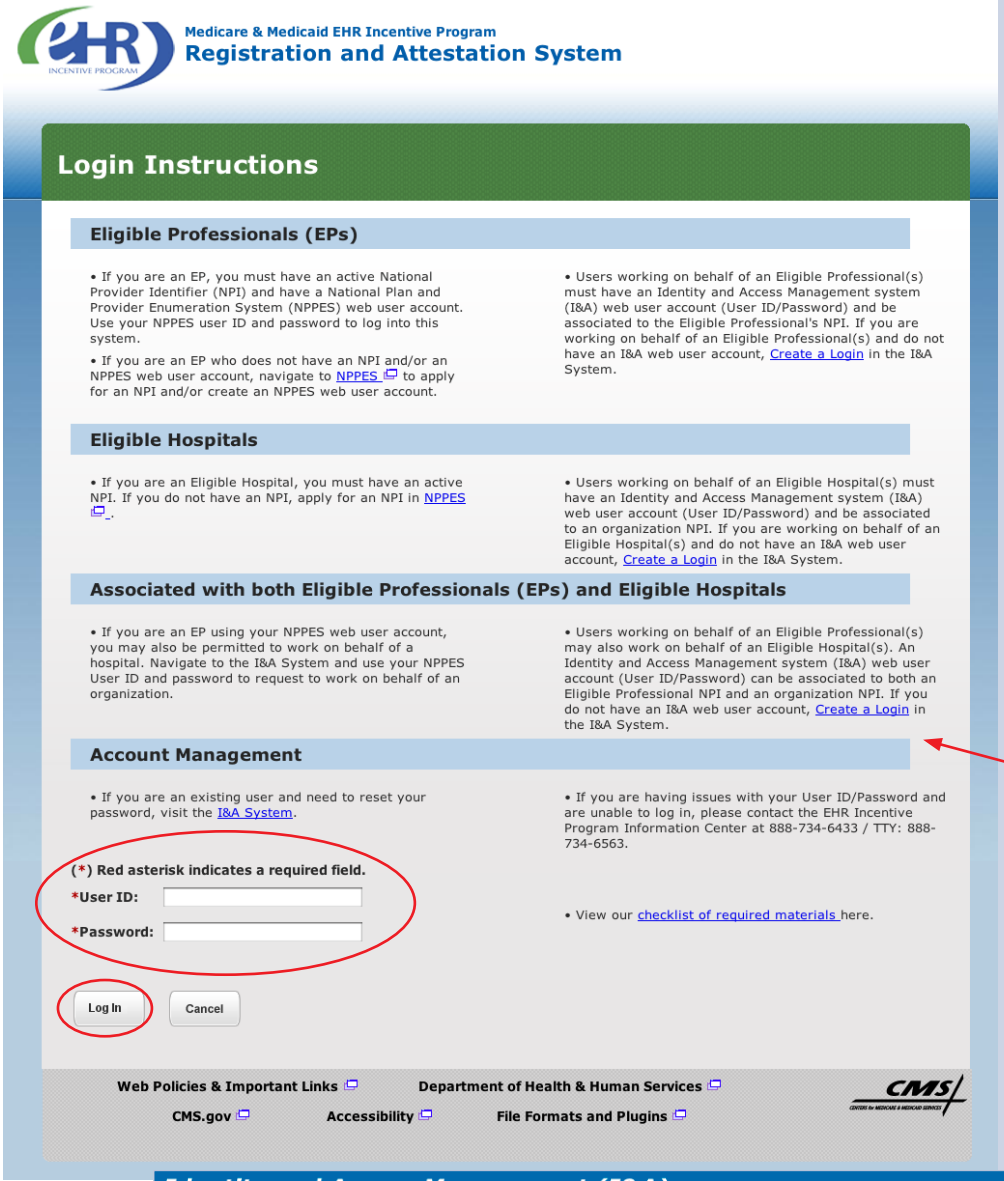
**TIP**

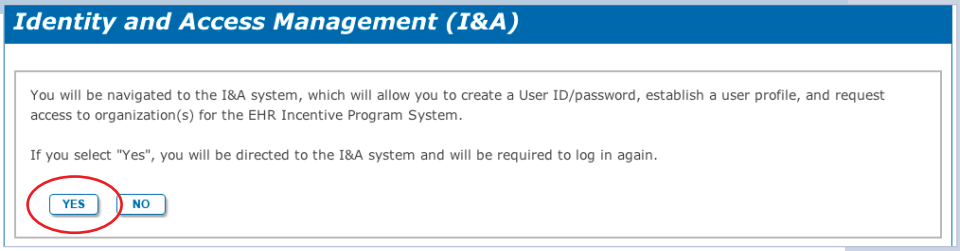
*Eligible Professionals (EPs) may not be hospital based. This is defined as EPs seeing 90% or more of their Medicare covered services in:*

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

## Step 2 - Login Instructions

Read the instructions under Eligible Hospitals for help in obtaining a user name and password for the Identification and Authentication (I&A) System.




## STEPS

Enter your Identification and Authentication (I&A) User ID and Password

Click the *Login* button

Users working on behalf of an eligible hospital must also have an identity and access management system (I&A) web user account

If you do not have an I&A User ID and Password, Click Create a Login

Click "yes" to access the I&A system which will allow you to create your User ID and Password

## TIPS

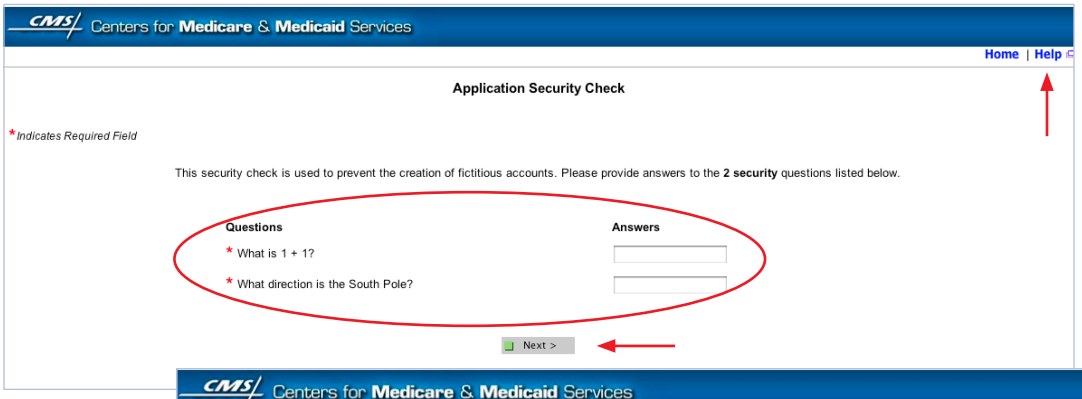
*User ID and Password are case sensitive*

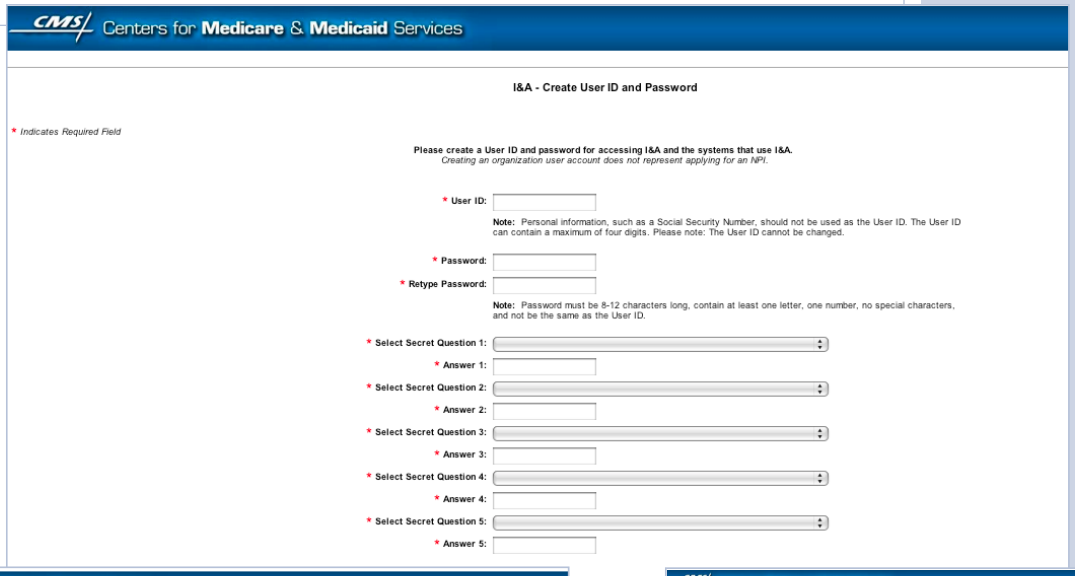
*Users registering on behalf of the hospital will need the hospital's CMS Certification Number (CCN) and National Provider Identifier (NPI)*

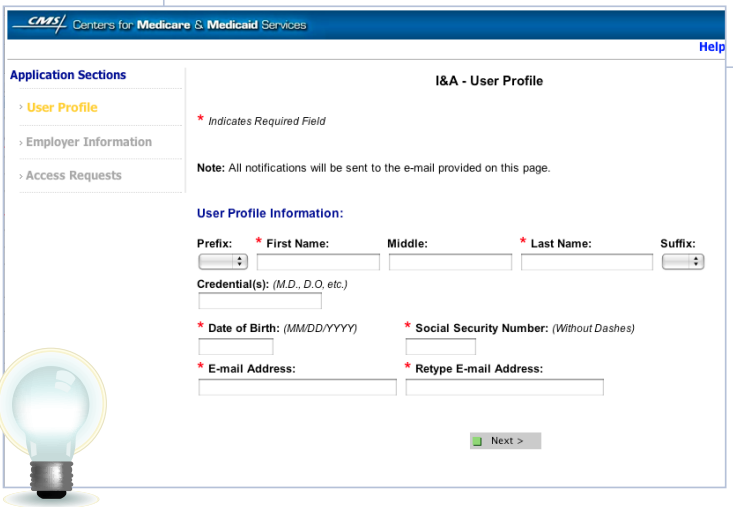
*To locate your NPI number, visit; https://nppes.cms.hhs.gov/NPPES/NPIRegistryHome.do*

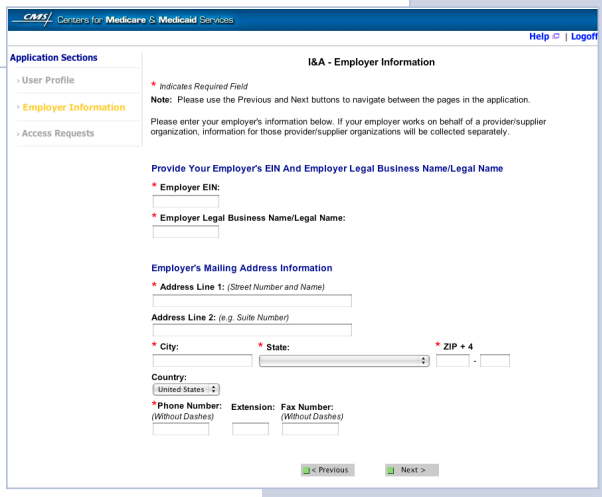
*To apply for an NPI click on NPPES (National Plan and Provider Enumeration System)*

# Step 2 – Login Instructions for Users Working on Behalf of an Eligible Hospital (cont.)




## STEPS

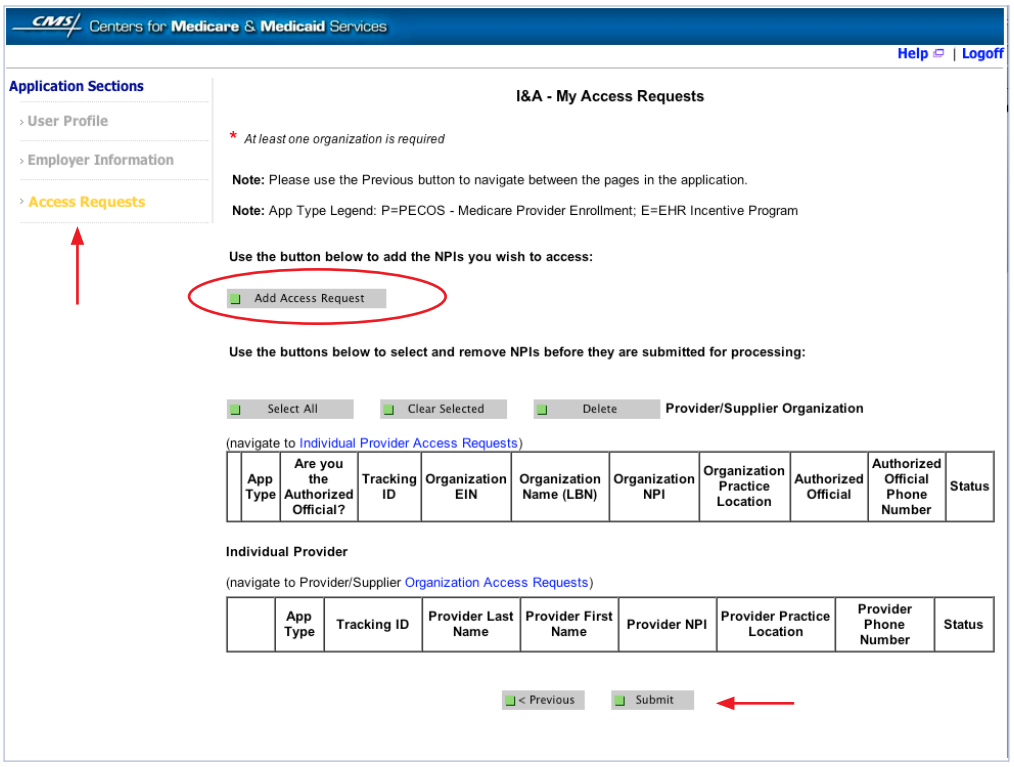
**Application and Security Check Page prompts the user to answer 2 security questions**

**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 Instructions for Users Working on Behalf of an Eligible Hospital (cont.)




## STEPS

Click on Access Requests

Click Add Access Request

Click **Submit**

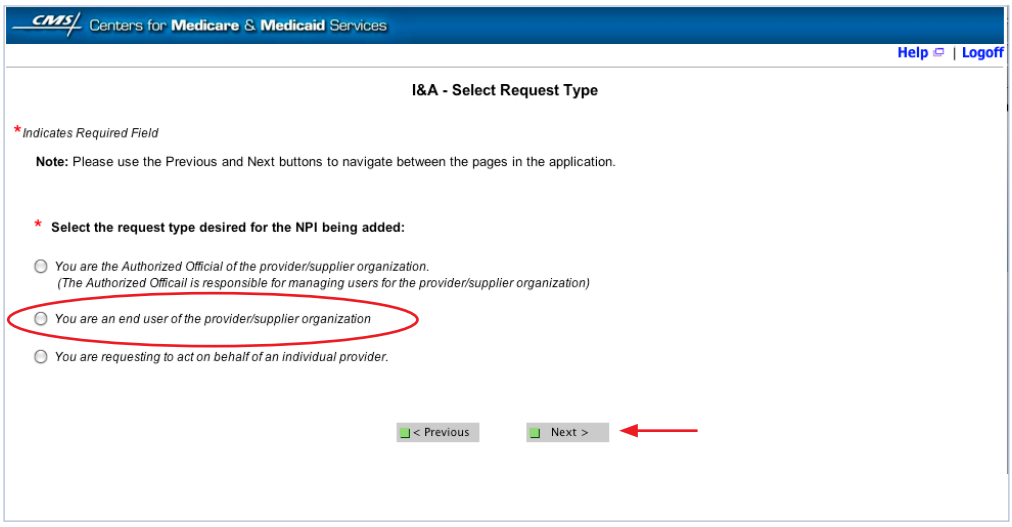
**TIP**

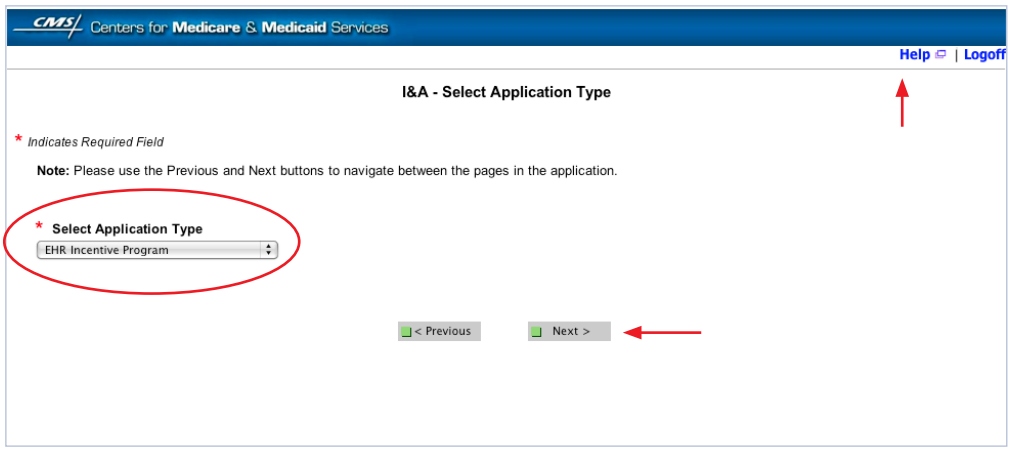
*At least one NPI is required to assign access*

*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 Instructions for Users Working on Behalf of an Eligible Hospital (cont.)




## STEPS

Click on "You are an end user of the provider/supplier organization"

Click **Next**

Select Application Type

"EHR Incentive Program"

Click **Next**

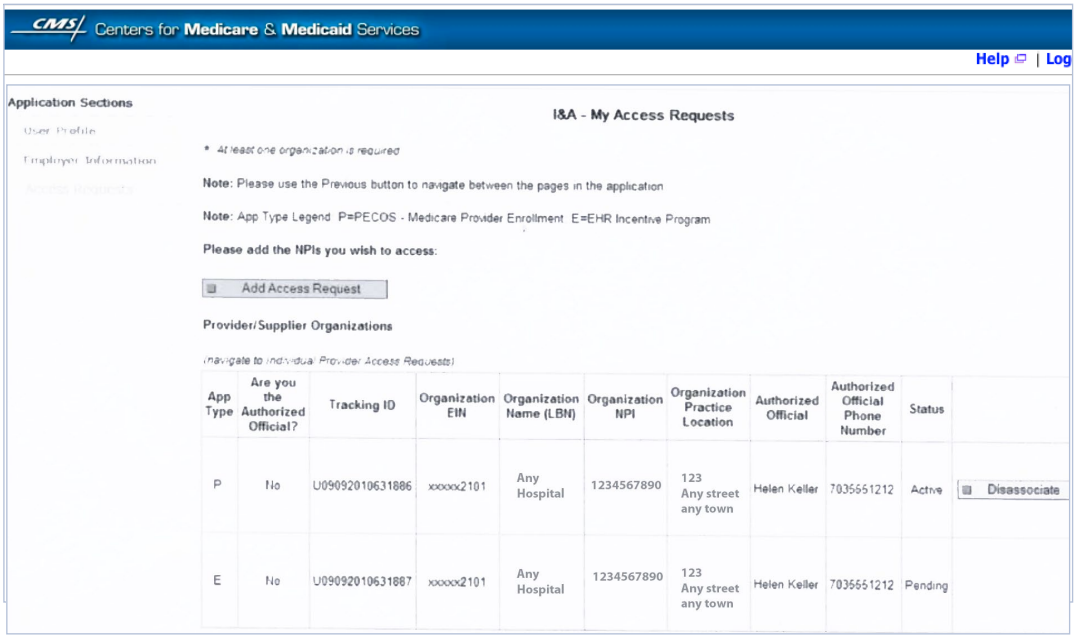
## TIPS

*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 Instructions for Users Working on Behalf of an Eligible Hospital (cont.)




## STEPS

Enter the NPI of the provider/supplier organization

Click **Search** to display the details of the provider/ supplier organization

Click **Save** to navigate to the 'My Access Requests Page'

*Or*

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

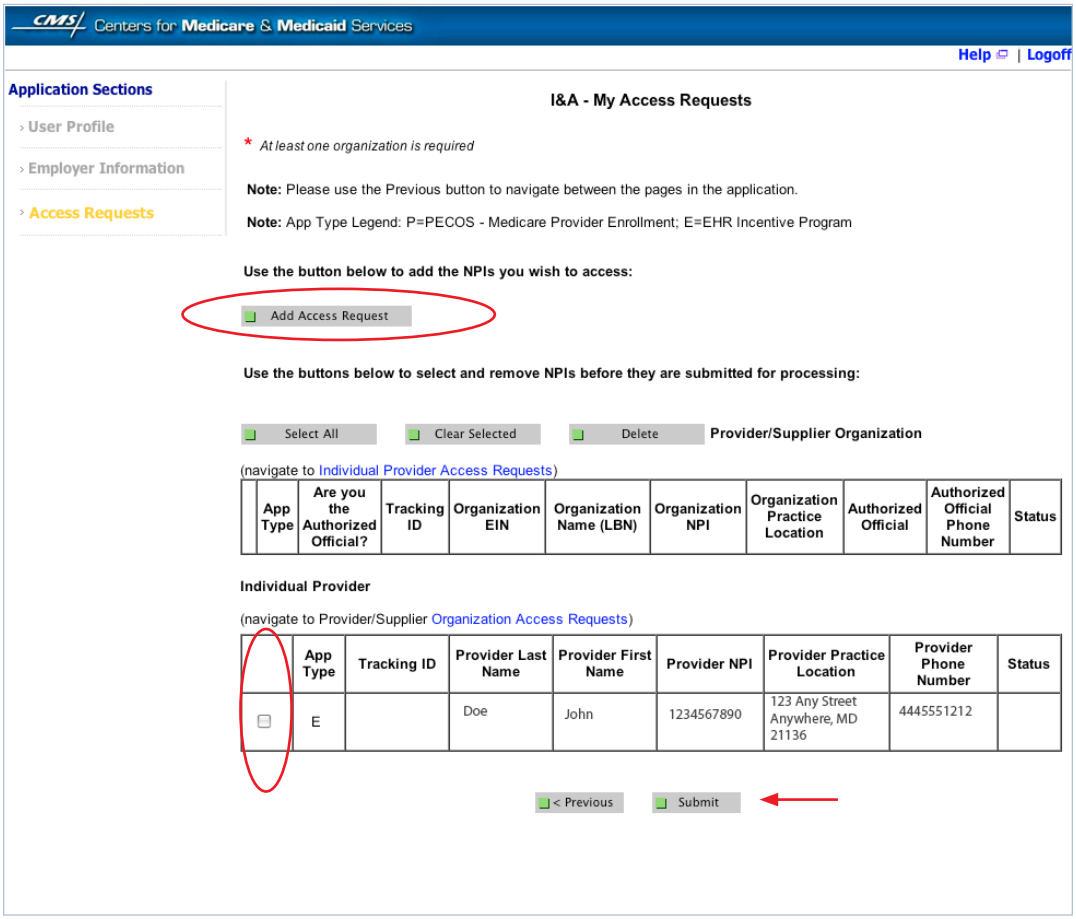
**TIP**

*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 Instructions for Users Working on Behalf of an Eligible Hospital (cont.)




## STEPS

Choose the Provider/ supplier organization you wish to access

You may choose one at a time or click Select All

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

Click **Submit**

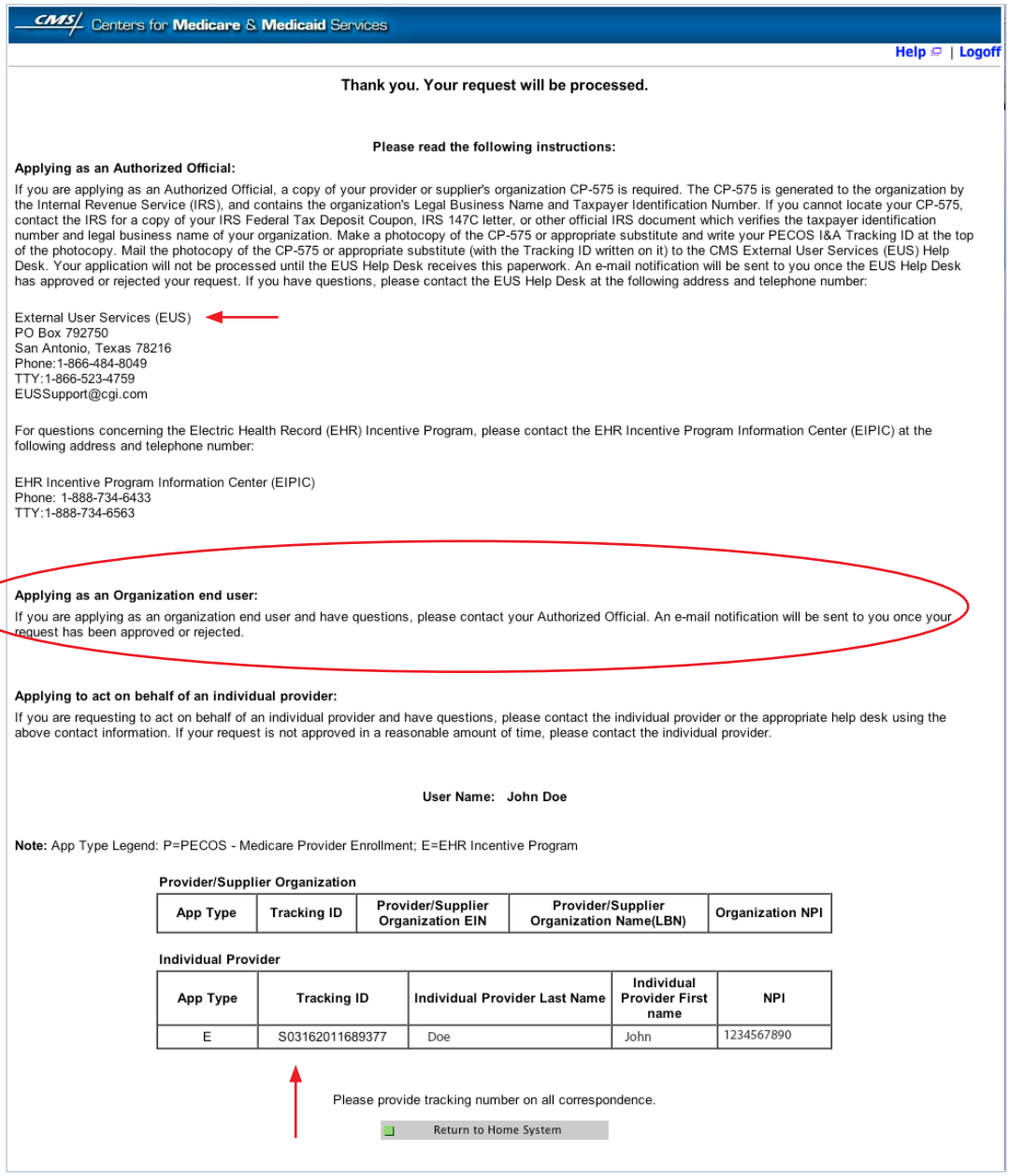
**TIP**

*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 Instructions for Users Working on Behalf of an Eligible Hospital (cont.)



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 authorized official must log into the I&A system and approve your request

Notify the authorized official that you have requested access

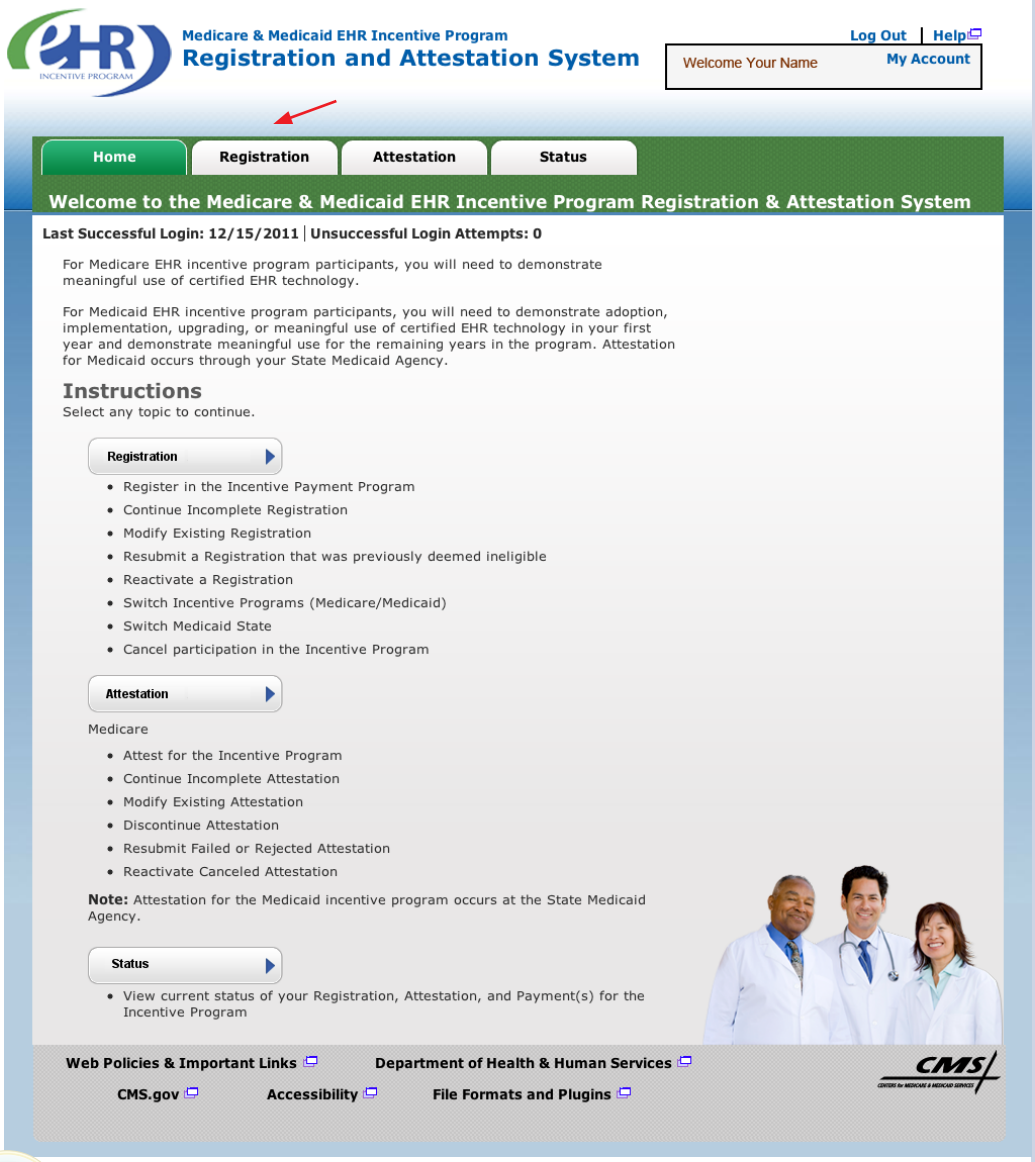
At this time there is not an automated email notification of the I&A system

**TIP**

*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.

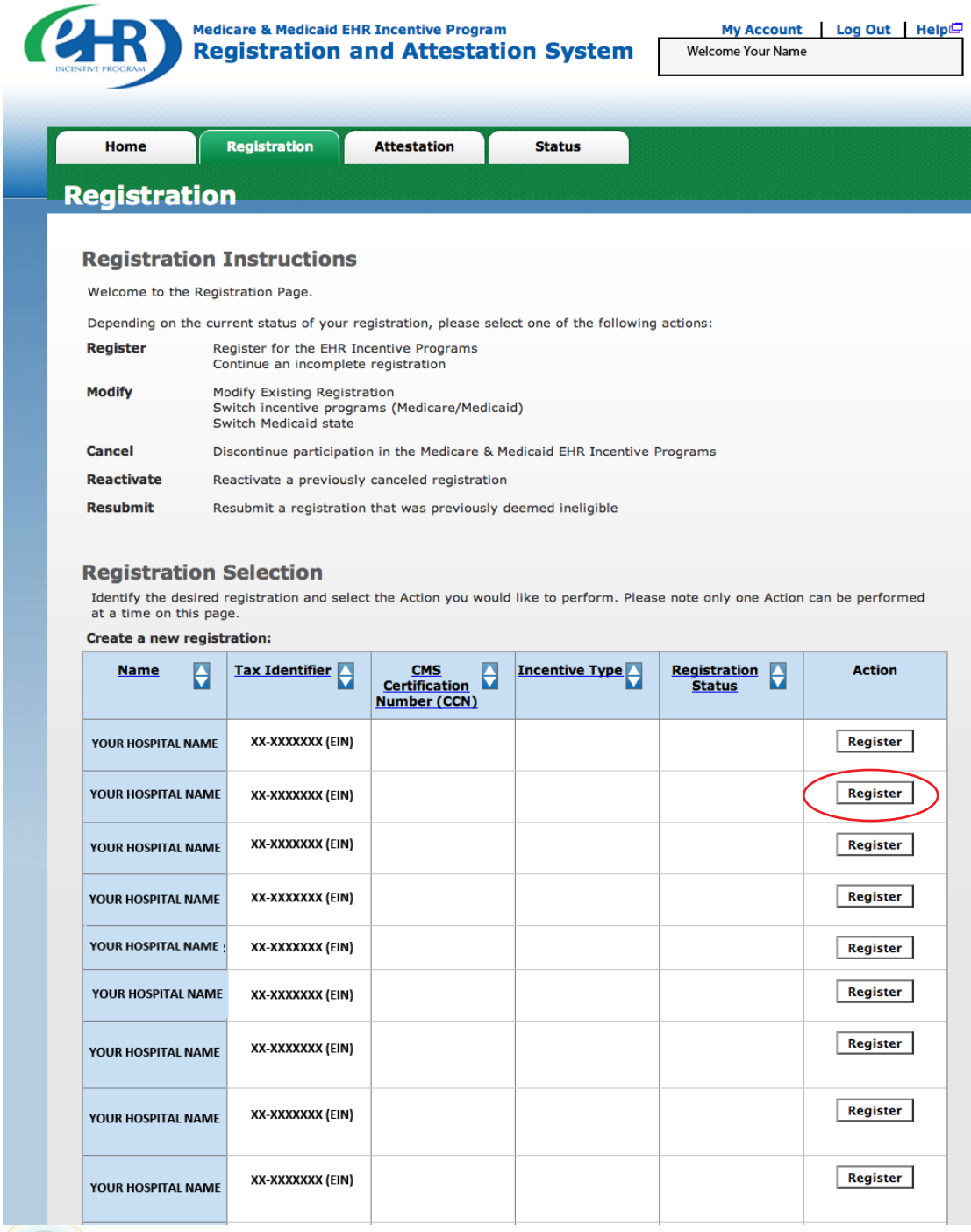
### TIPS

*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

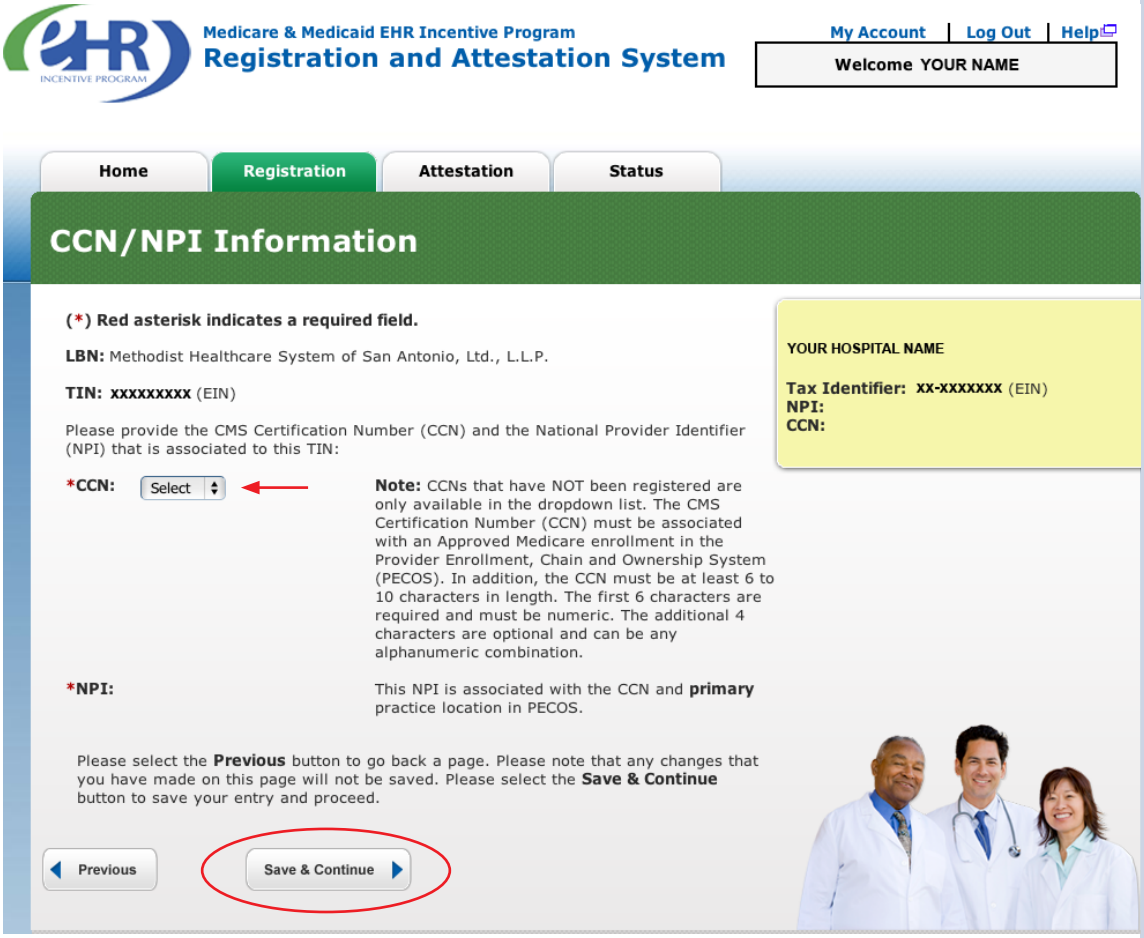
*"Resubmit", "Modify", "Cancel" and "Reactivate" are the available Action web links for returning users*

*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 – Identification Questionnaire

The legal business name (LBN) and taxpayer identification number (TIN) are pulled from National Plan and Provider Enumeration System (NPPES).




### STEPS

Select the hospital CCN from the drop-down menu

Click *SAVE AND CONTINUE*

### TIPS

*The user must enter a CCN and NPI that are associated with the TIN in order to proceed with the registration*

*For more information on TINs and EINs, visit http://www.irs.gov/*

## Step 5 – Reason for this Registration

Review and follow the registration instructions below.

### STEPS

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

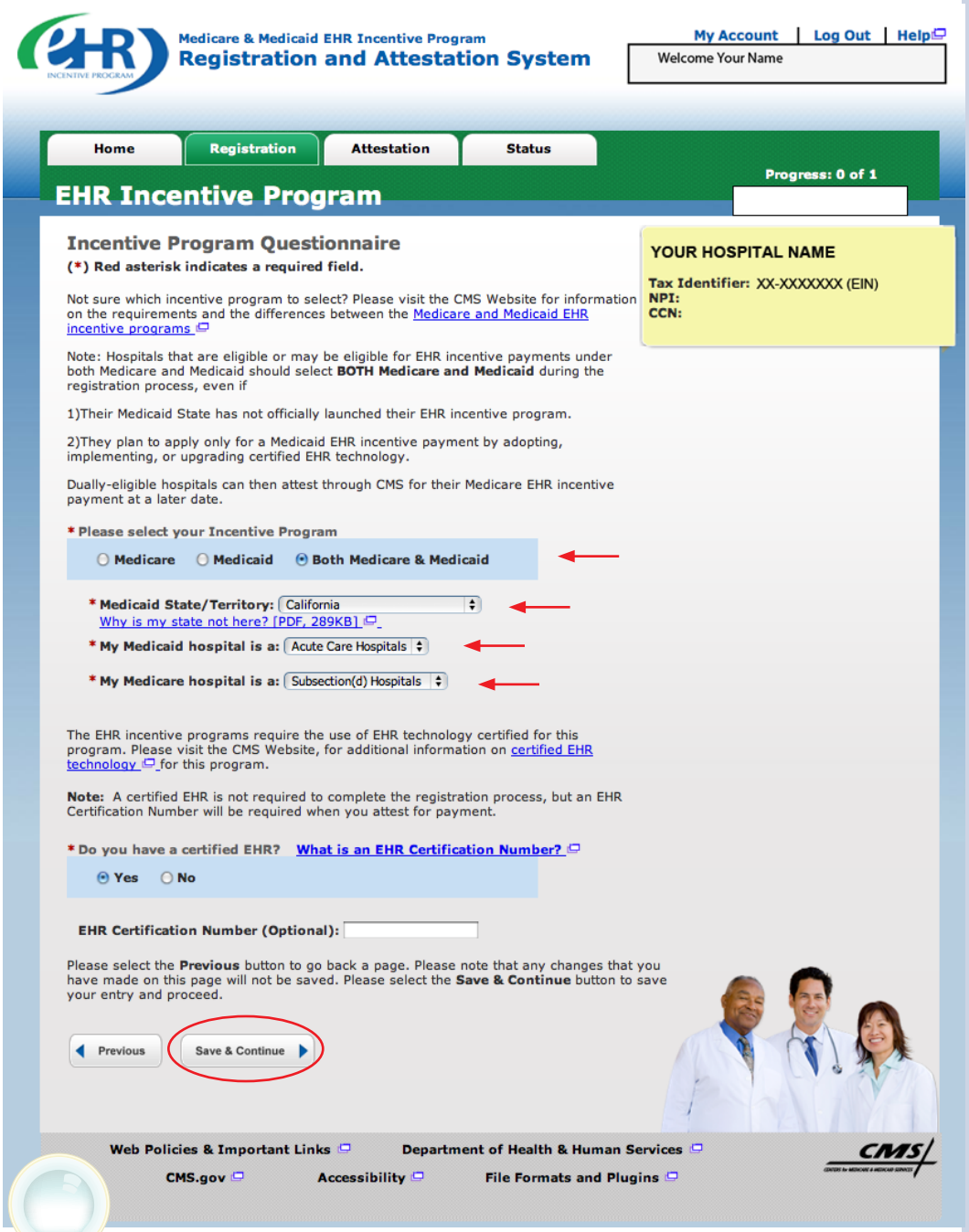
### TIPS

*Data required for this registration is grouped into two topics. Both topics must be completed*

*Progress bars will indicate the progress for each topic*

*When both topics are completed user can select Proceed with Submission*

# Step 7 – Incentive Program Questionnaire for Both Medicare & Medicaid Eligible Hospitals




## STEPS

Select Both Medicare & Medicaid Incentive Program

Select the Medicaid State/Territory

Select the Medicaid hospital type

Select the Medicare hospital type

Enter your CMS EHR Certification Number if you have it

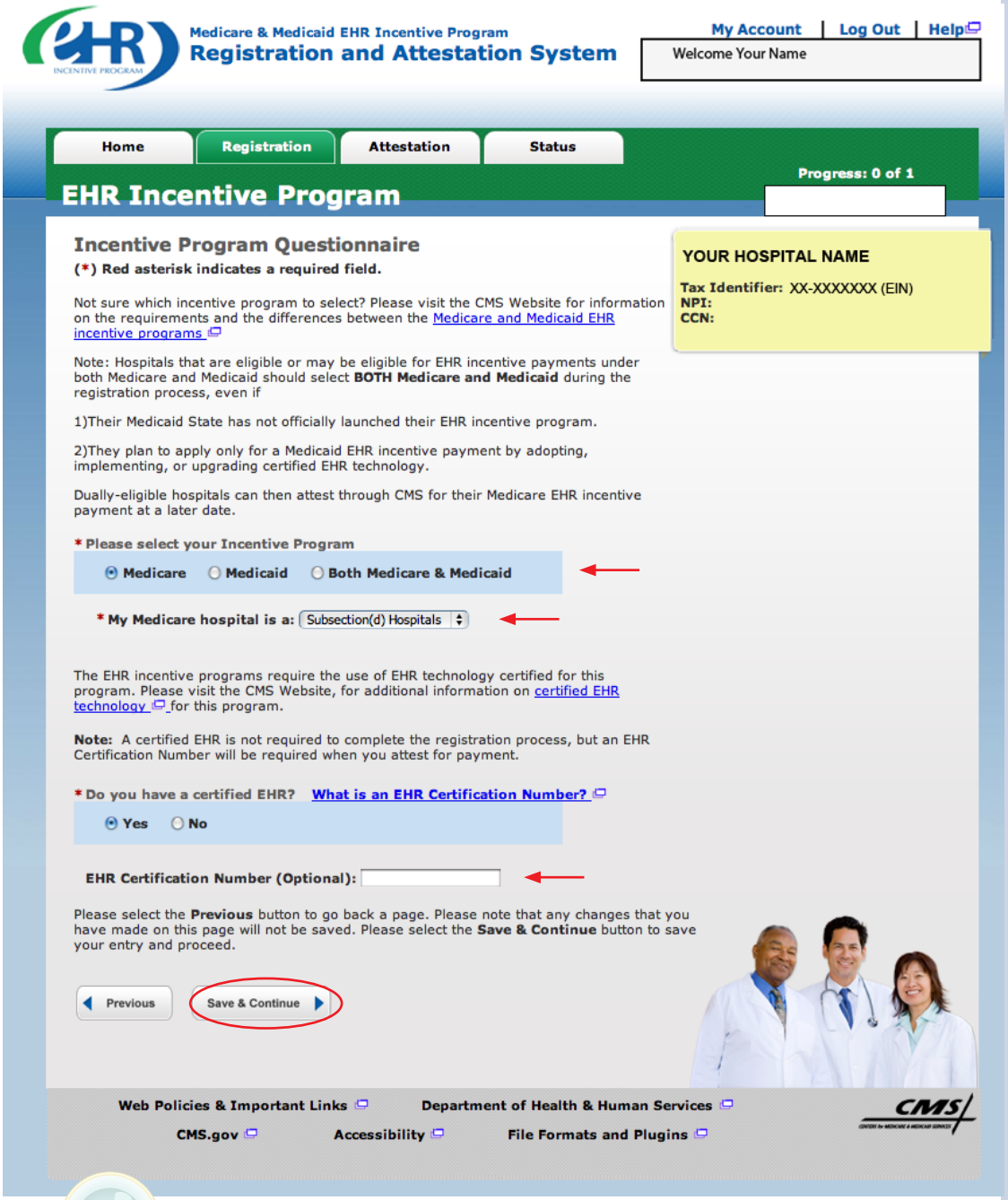
Click *Save & Continue*

## TIPS

*The CMS EHR certification number is 15 alpha numeric characters,the alpha numeric number is case sensitive and is required for Attestation but not for Registration*

*For the certified health IT product List visit, http://healthit.hhs.gov/CHPL Follow the instructions on the website to locate your CMS EHR certification number*

# Step 7 – Incentive Program Questionnaire for Medicare Only Eligible Hospitals




## STEPS

Click the Medicare incentive program

Select your Medicare hospital type

Enter your EHR Certification Number if you have it

Click *Save & Continue*

## TIPS

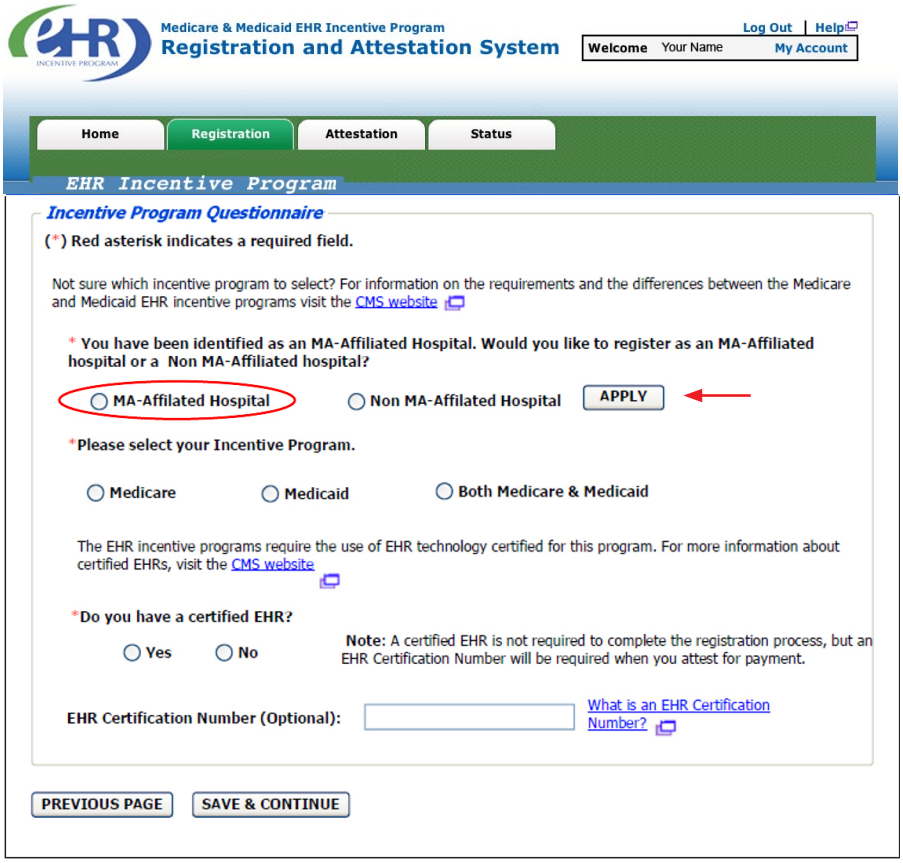
*The CMS EHR certification number is required for Attestation, but is not for Registration*

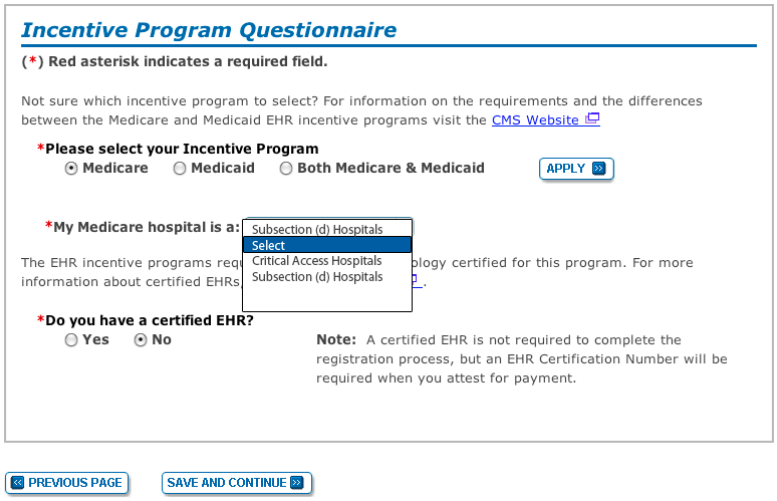
*For the certified health IT product List visit,*

*http://healthit.hhs.gov/CHPL*

*Follow the instructions on the website to locate your CMS EHR certification number*

# Step 7 – Incentive Program Questionnaire for MA-Affiliated Hospitals




## STEPS

Click the MA-Affiliated Hospital button program

Click on

Enter your MAO Contract Number

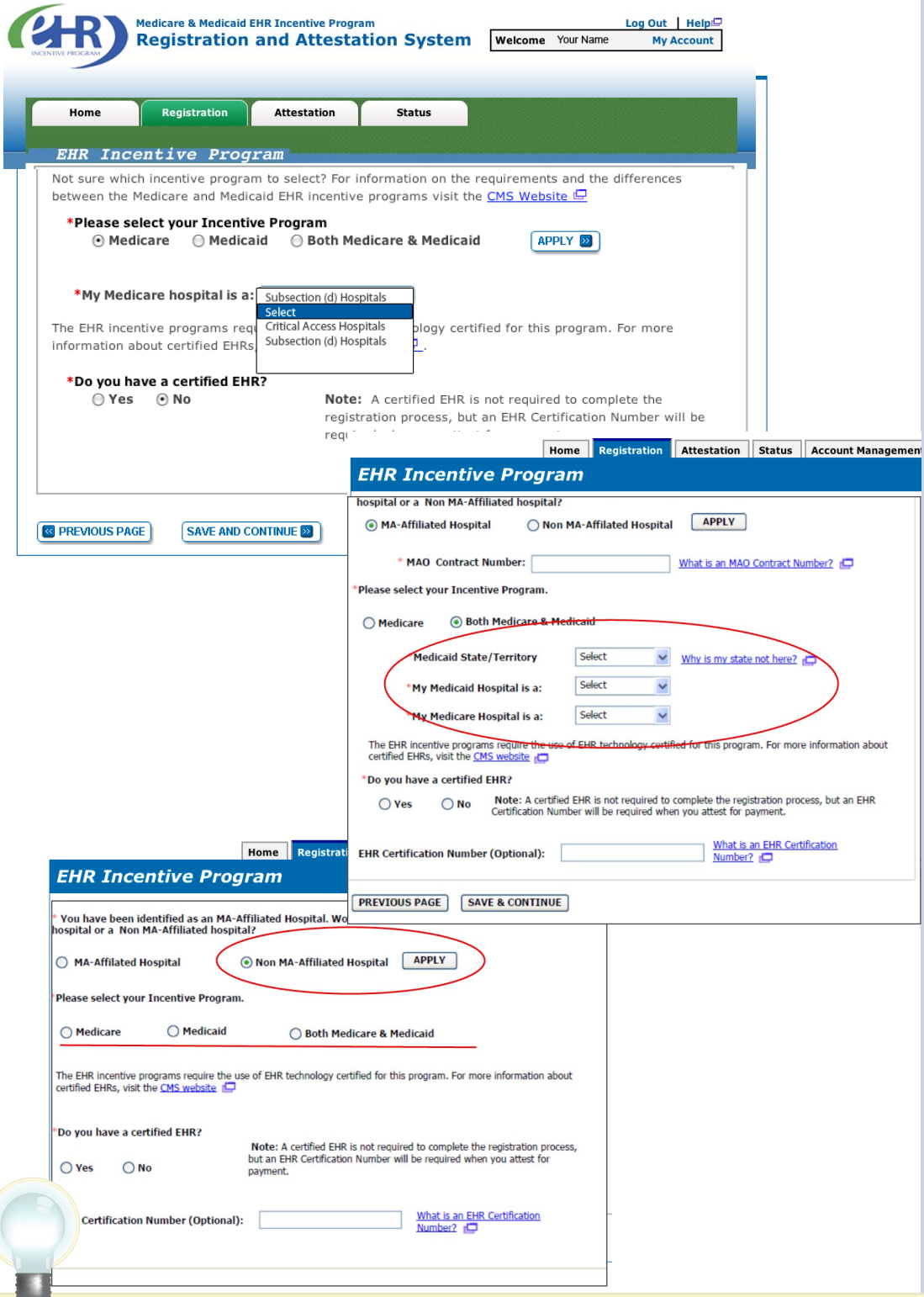
Select your Incentive Program – Medicare or both Medicare and Medicaid

Click

**TIP**

*Click on "What is an EHR Certification number" for more information*

# Step 7 – Incentive Program Questionnaire for MA-Affiliated Hospitals (cont.)




## STEPS

For the Medicare Incentive Program, select your hospital type from the drop down menu

Click *Save & Continue*

For Both Medicare and Medicaid Incentive Program, enter your:

- Medicaid State/Territory
- Medicaid hospital type
- Medicare hospital type

Enter your CMS EHR Certification Number if you have it

Click *Save & Continue*

Click on the "Non MA-Affiliated button if you prefer to register as a "Non MA-Affiliated Hospital

Choose your Incentive Program

Enter your CMS EHR Certification Number if you have it

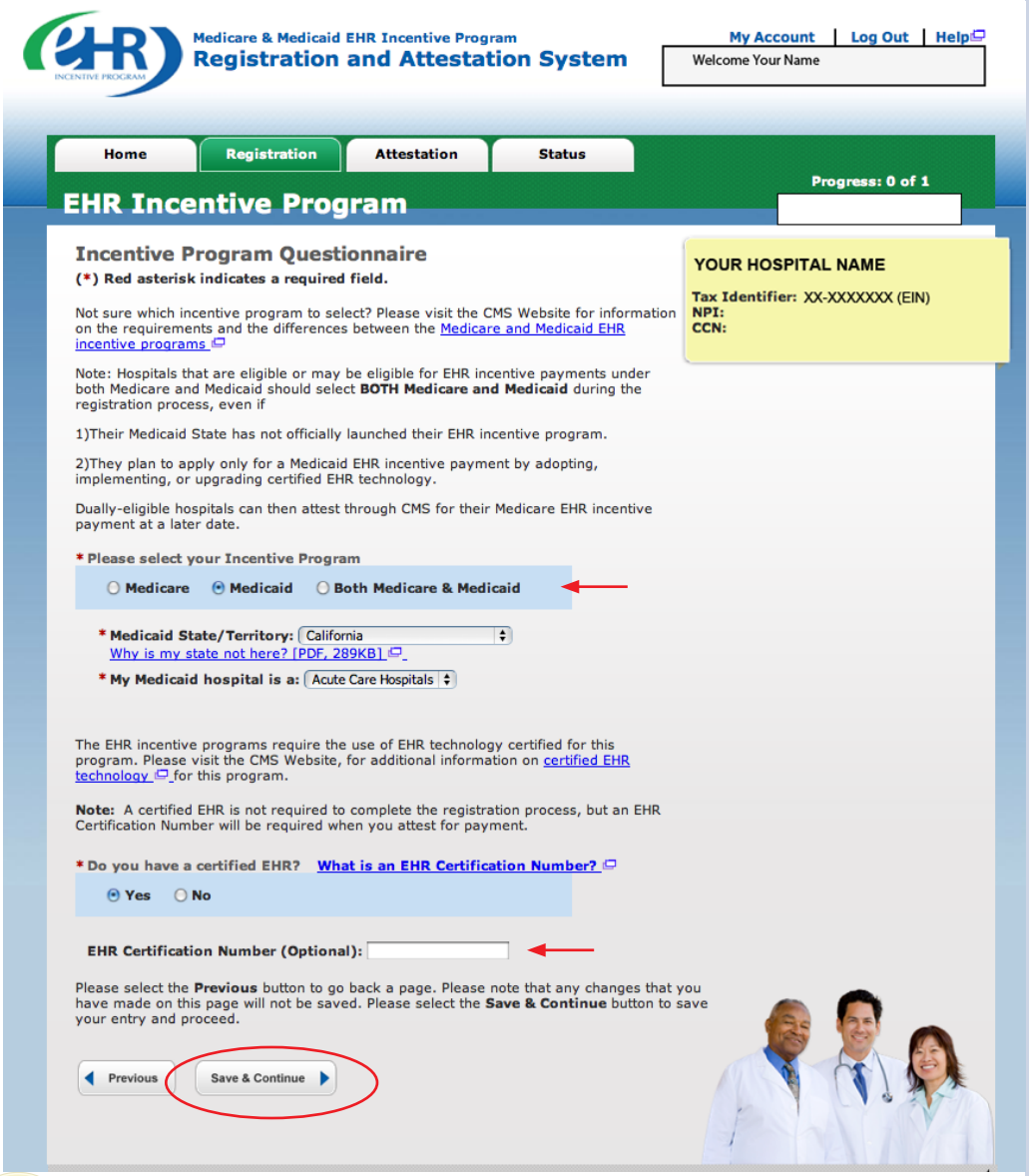
Click *Save & Continue*

## TIPS

*The CMS EHR certification number is required for Attestation, but is not for Registration*

*For the CMS EHR certified health IT product List visit, http://healthit.hhs.gov/CHPL*
*Follow the instructions on the website to locate your CMS EHR certification number*

# Step 7 – Incentive Program Questionnaire for Medicaid Only Eligible Hospitals




## STEPS

**Click the *Medicaid* incentive program**

**Click on *APPLY***

**Select your Medicaid State/Territory**

**Select your Medicaid hospital type**

**Enter your CMS EHR Certification Number if you have it**

**Click *Save & Continue***

## TIPS

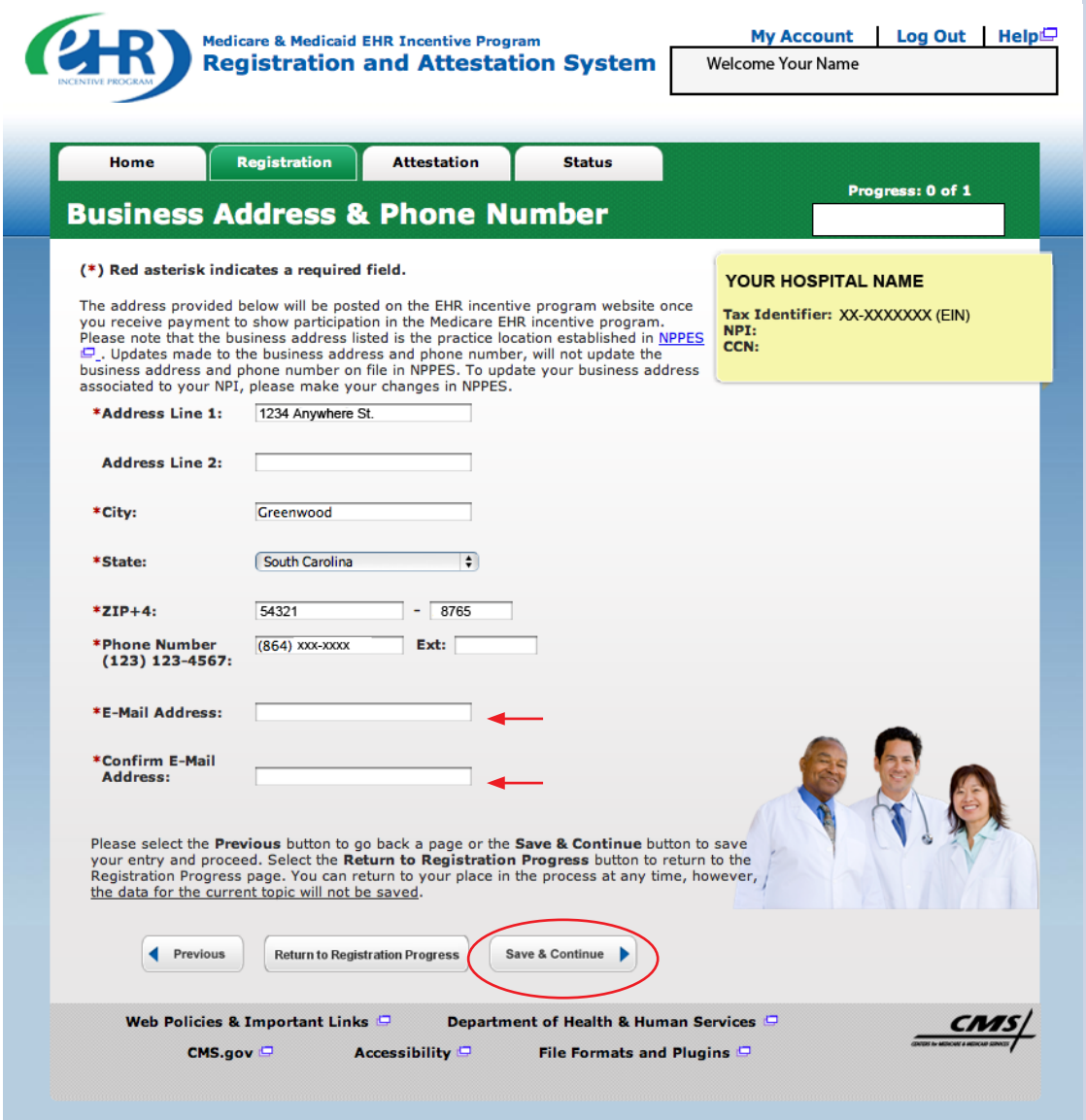
*If your state's program has not yet launched at the time of your registration, your file will be placed into a pending status until your state's program is launched*

*The CMS EHR certification number is required for Attestation, but is not for Registration*

*For the certified health IT product List visit, http://healthit.hhs.gov/CHPL Follow the instructions on the website to locate your CMS EHR certification number*

## Step 8 – Business Address and Phone

The business address and telephone number are pulled from the hospital's practice location stored National Plan and Provider Enumeration System (NPPES).




### 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*

### TIPS

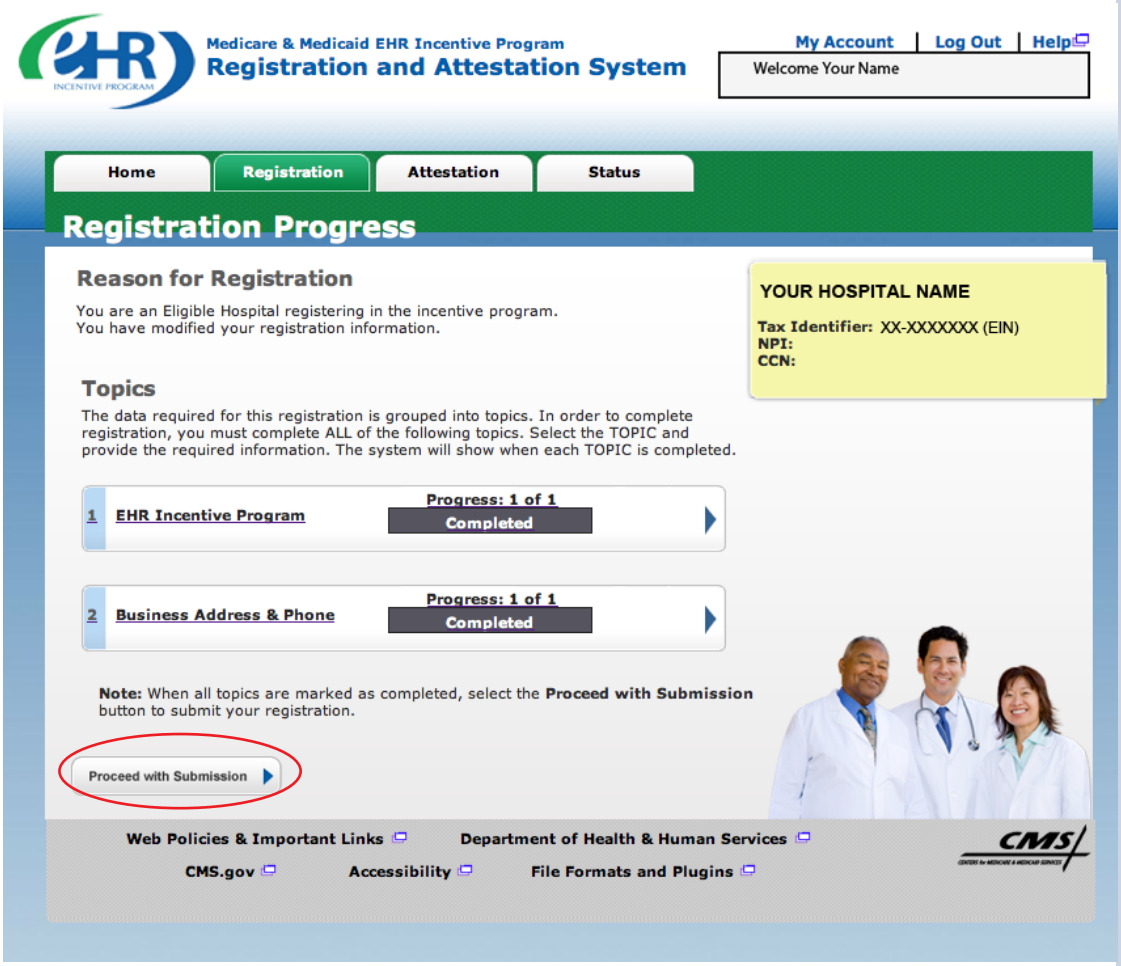
*The address will be posted on the EHR Incentive Program website once you receive payment for Medicare payments. There is no such requirement for CMS to publish information on eligible professionals and hospitals receiving Medicaid EHR incentive payments, though individual States may opt to do so*

*The fields can be updated on this screen. However, the data is not sent back to NPPES*

*The business address cannot be a P.O. Box address*

## Step 9 – Topics for this Registration

Topics for this Registration will display when both Topics are *completed*.




## STEPS

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

## TIPS

*Data required for this registration is grouped into two topics. Both topics must be completed*

*Progress bars will indicate the progress for each topic*

*When both topics are completed user can select Proceed with Submission*

## Step 10 – Verify Registration Information

Be sure to verify all of the information.

### STEPS

Review your registration information for accuracy

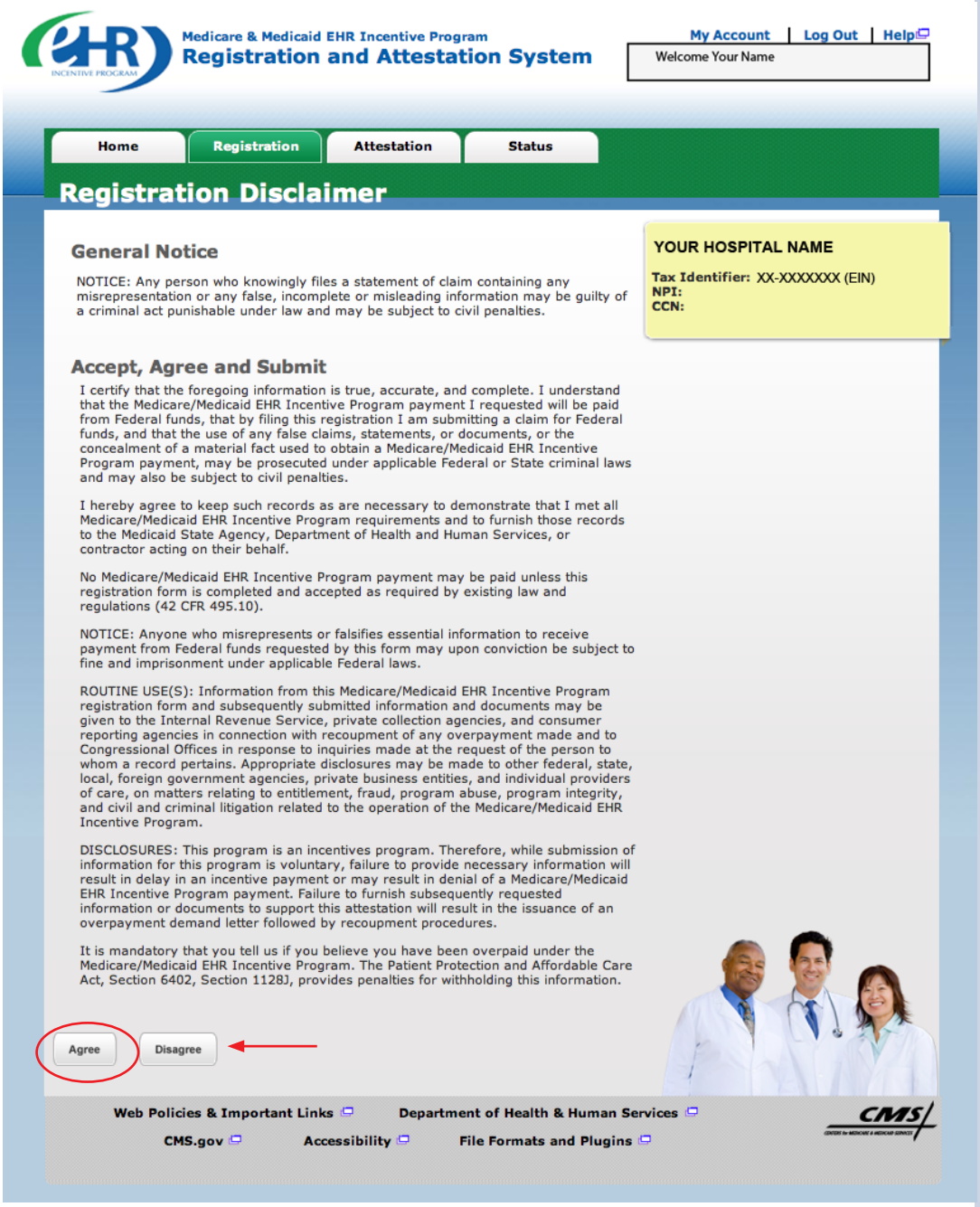
Click *Submit Registration* to continue

**TIP**

*Click on Exit to revise your registration*

## 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

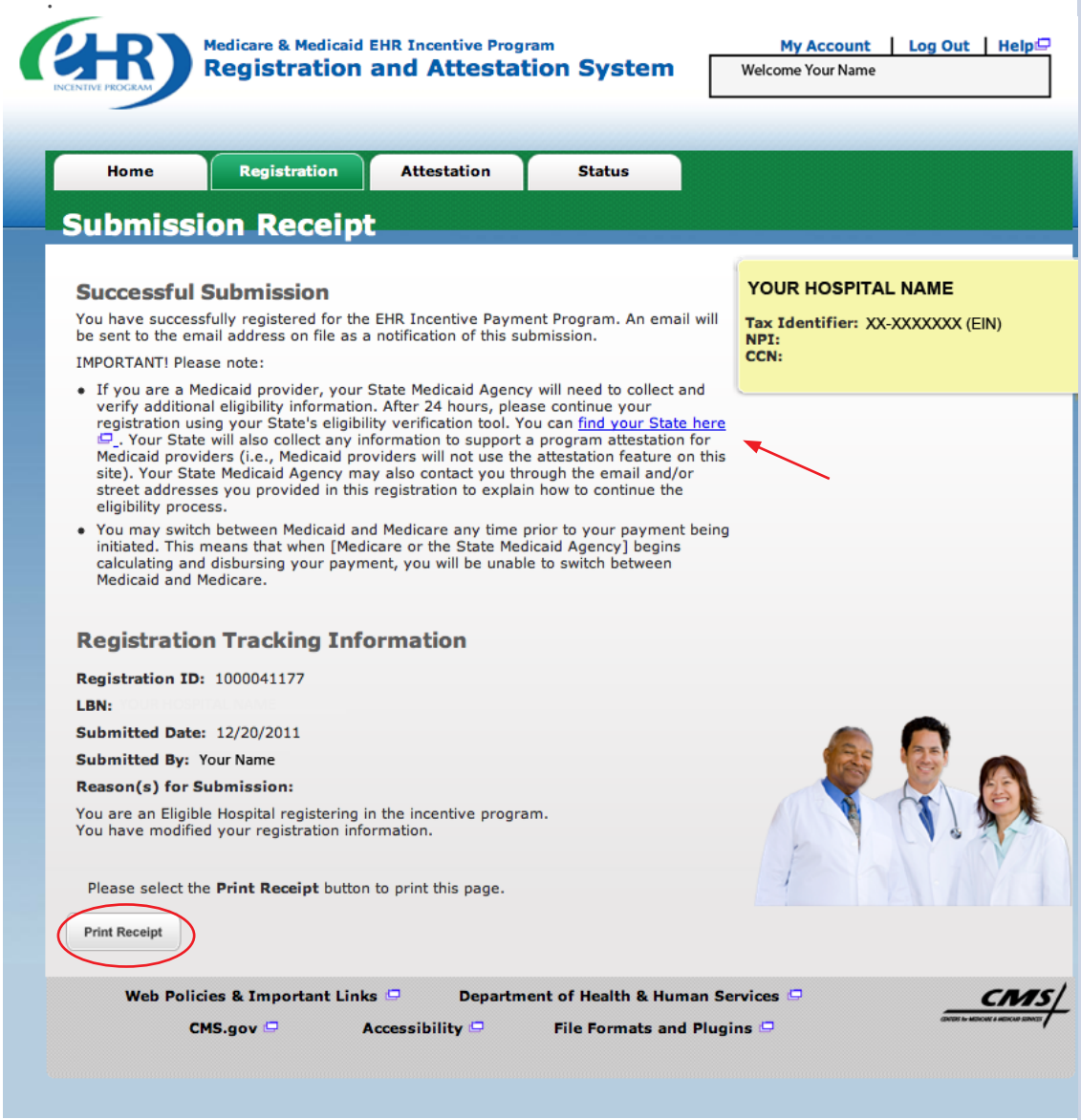
### TIPS

*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*

*Clicking Agree is considered the same as an electronic signature and completes the submission process*

# Step 12 – Submission Receipt (Successful Submission)

## Both Medicare & Medicaid Eligible Hospitals




## STEPS

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

*If your state has launched their program, wait 24 hours to contact your State to finish the registration, to allow for processing*

*If your state is not ready to accept your application you will have to wait until the state launches the program to complete the registration process*

*Print a copy of the receipt for your records*

# Step 12 – Submission Receipt (Successful Submission) for Medicare Eligible Hospitals only

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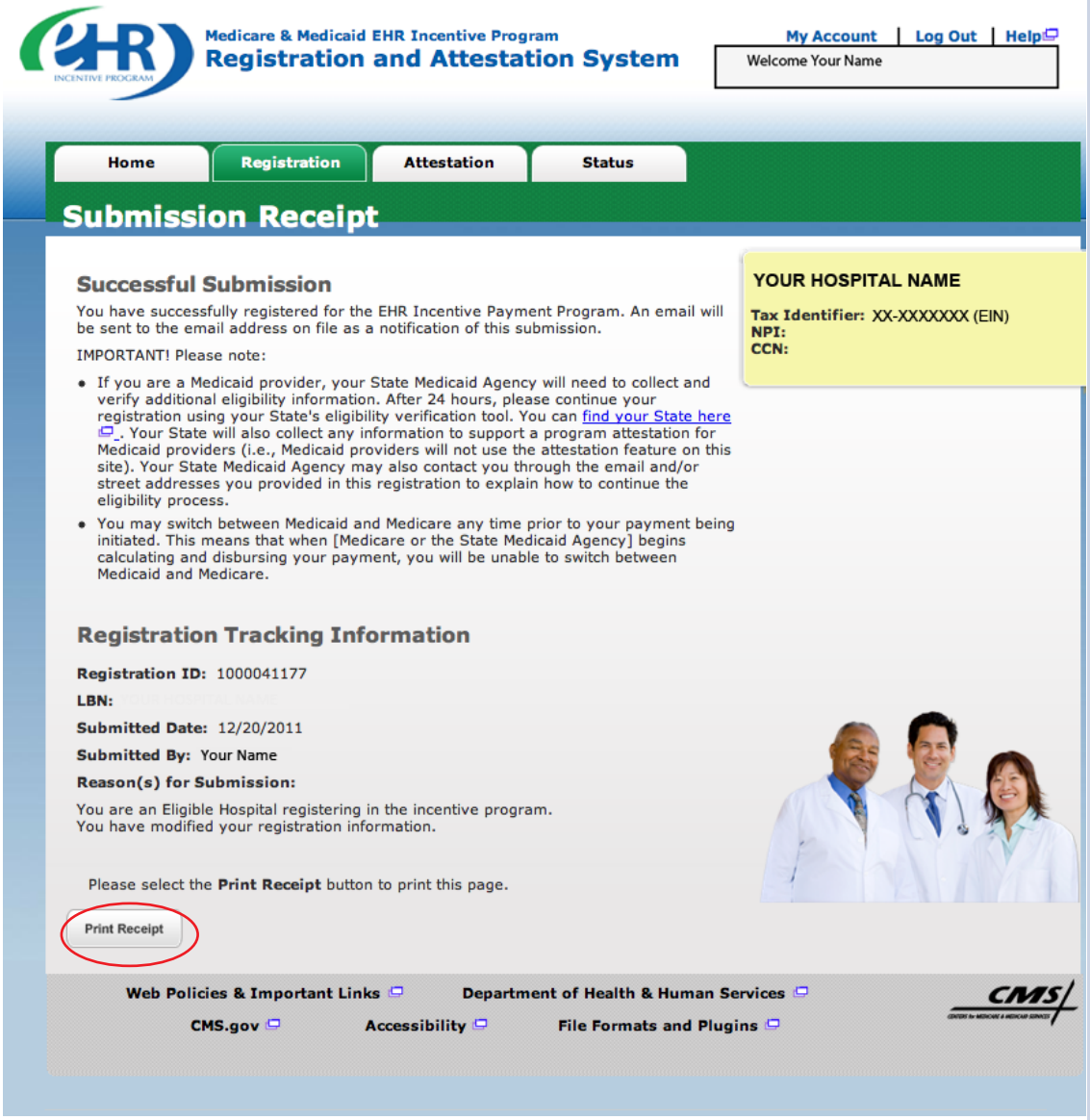



## STEPS

*This completes your registration*

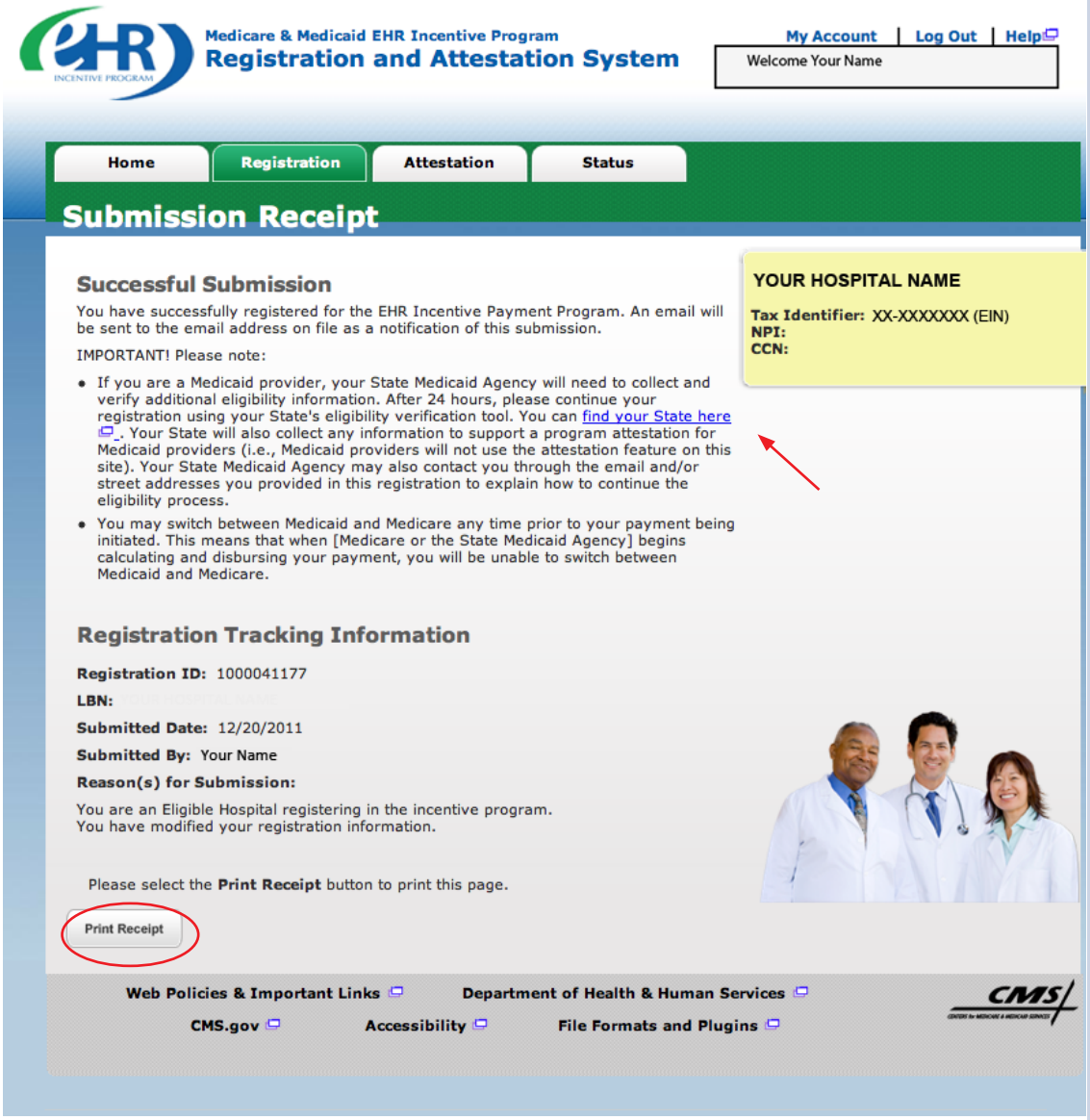
**Print this page for your records. You will receive an email confirmation from this registration**

## TIPS

*A registration tracking ID number will be assigned to your registration*

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

# Step 12 – Submission Receipt (Successful Submission) for Medicaid Eligible Hospitals only




## STEPS

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

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

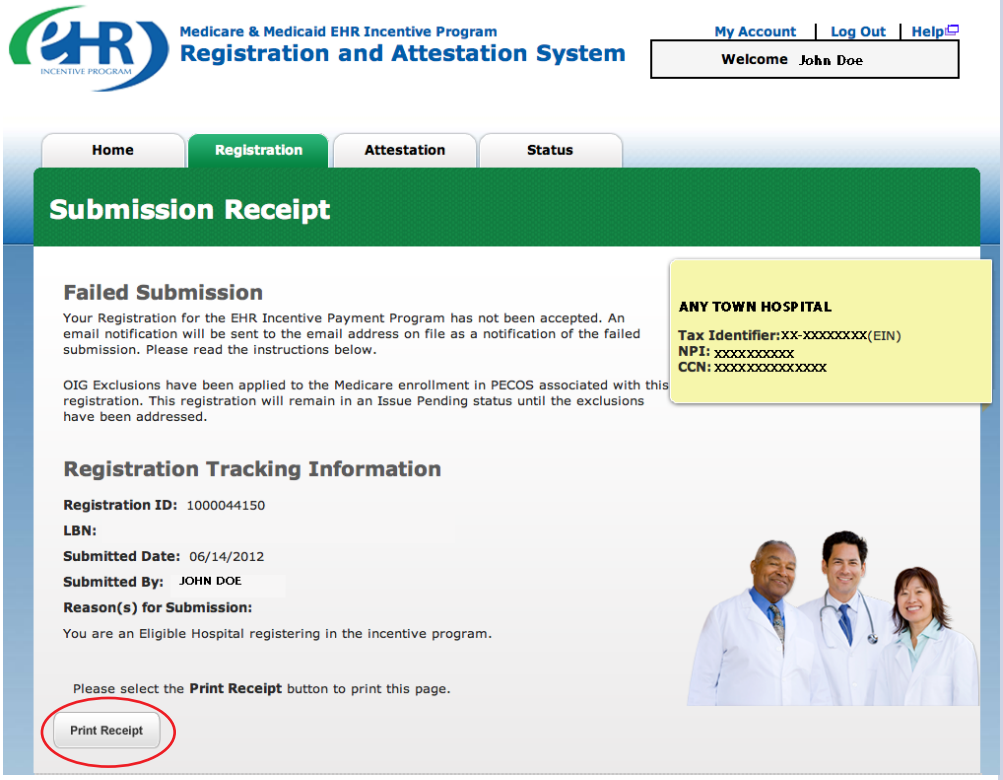
## TIPS

*If your state has launched their program, wait 24 hours to contact your State to finish the registration, to allow for processing*

*If your state is not ready to accept your application you will have to wait until the state launches the program to complete the registration process*

*Print a copy of the receipt for your records*

## Step 12 – Submission Receipt (Failed Submission)




Reasons for a failed submission are listed below with contact information.

**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 (Medicare/Medicaid) 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

### STEPS

Your registration has failed

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

Click *Print Receipt* to get a copy for your records

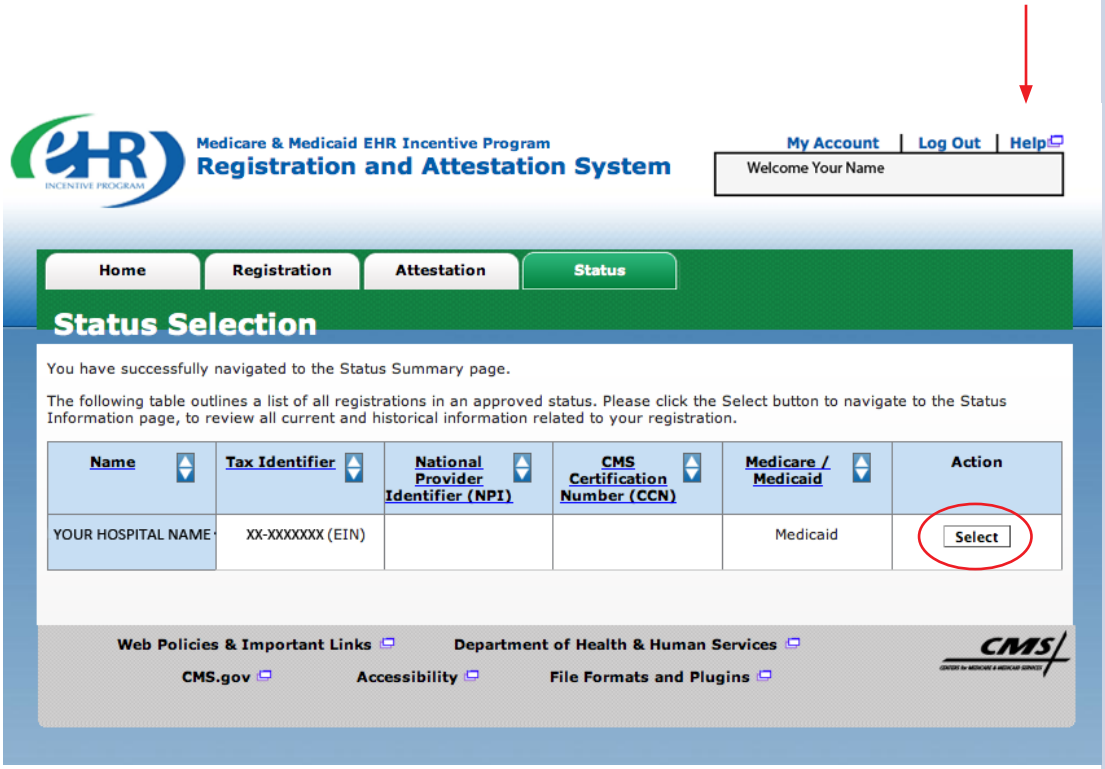
### TIPS

*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 *Select* button to view registration detail

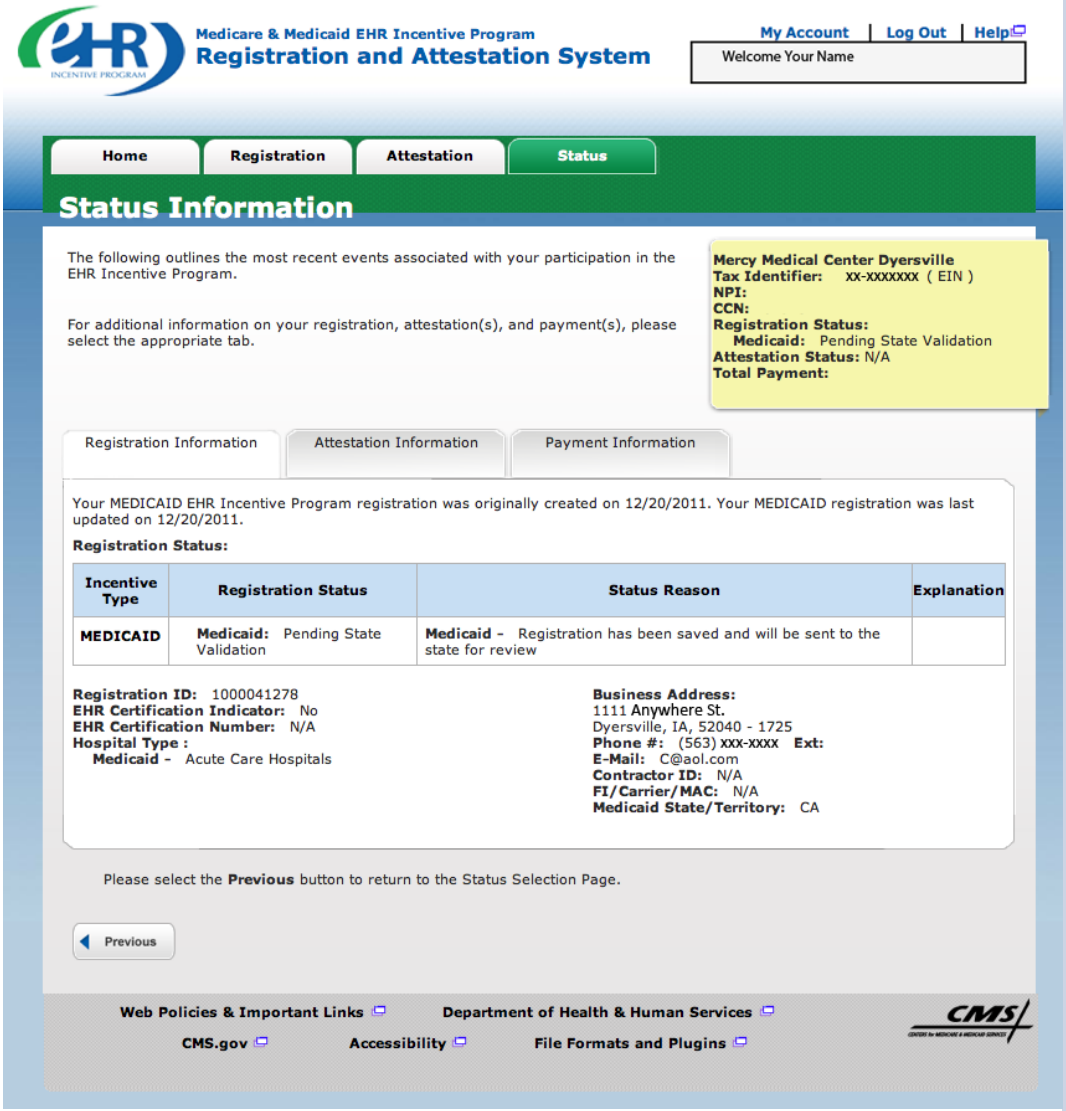
### TIPS

*Click Select in the Action Column to view detail*

*Click on help at the top of the screen for more informstion*

## Step 14 – Status Information

Review the details of your registration process.




### STEPS

Registration details appear in the body of the screen

Review the registration status reason, Fiscal Intermediary (FI)/ Carrier/Medicare Administrative Contractor (MAC) and validations performed on your registration

### TIPS

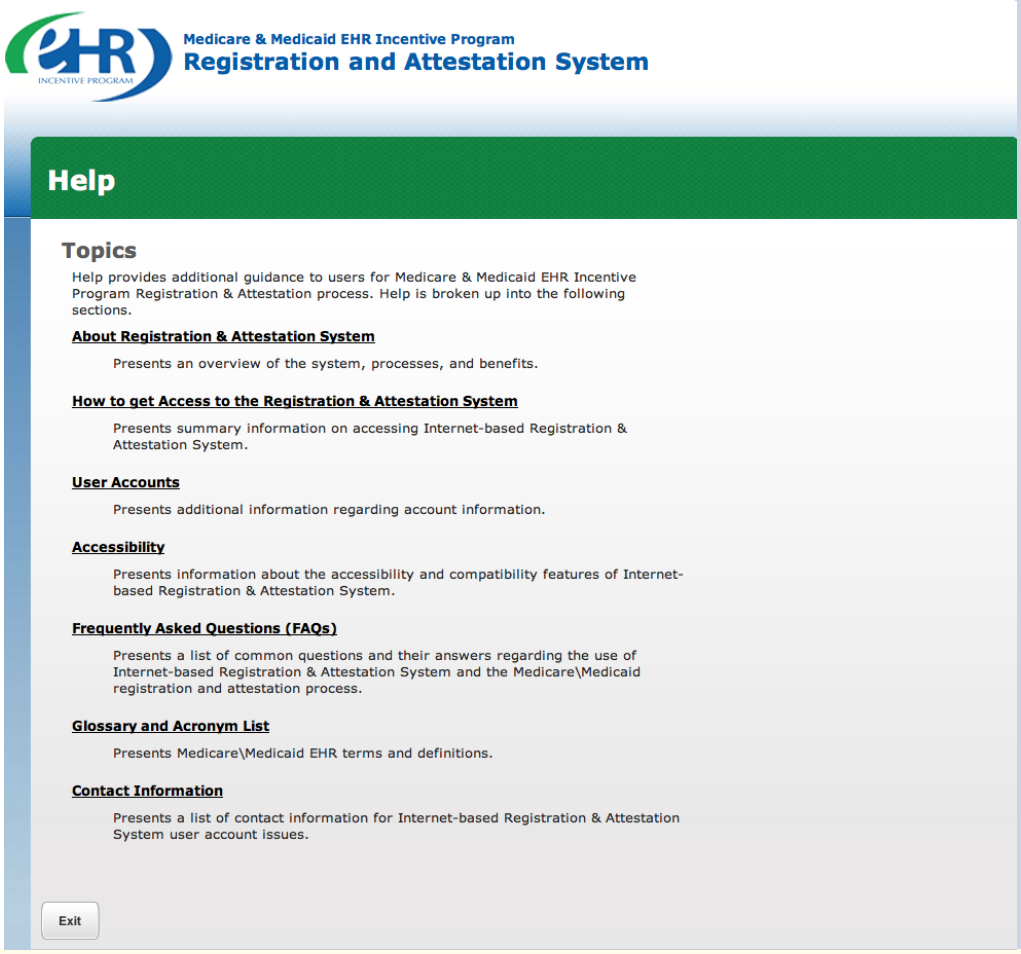
*Registration status will read "Pending State Validation" until the registration process is completed by the State*

*Other registration statuses are:*
*"Issue Pending"*
*"In Progress"*
*"Rejected"*

*Click Previous to return to the Status Selection Page*

## Have Questions?

There are many resources available to you.




### STEPS

**Remember to click the help link which is located on every screen**

**Review the list of resources that are available to you at any time**

### 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/*

ACRONYMS

## Acronym Translation

| | |
|---|---|
| CMS | Centers for Medicaid & Medicaid Services |
| DMF | Social Security Death Master File |
| 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 |
| PECOS | Provider Enrollment Chain and Ownership System |
| RHC | Rural Health Center |
| SSN | Social Security Number |
| TIN | Tax Identification Number |

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Electronic Health Record Incentives
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