REGISTRATION USER GUIDE
For Medicaid Eligible Professionals

Medicaid

Promoting Interoperability (PI) Program

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Disclaimer

The Centers for Medicare & Medicaid Services (CMS) is providing this material to guide the Medicaid physicians and non-physician practitioners in using the CMS Promoting Interoperability (PI) Registration System.

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

Medicare and Medicaid regulations can be found on the CMS website at http://www.cms.gov
**Step 1 – Getting Started**

This is a step-by-step guide for the Medicaid Eligible Professionals (EPs) Promoting Interoperability (PI) 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.

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**STEPS**

Enter the Promoting Interoperability Program URL (located at the top of the page) into your web browser.

Click *Continue* to start the registration process.
Step 1 - Continued
Carefully review the screen for important information.

Promoting Interoperability Programs
Registration System

Warning

(“) Red asterisk indicates a required field.

WARNING: Only authorized registered users have rights to access the Promoting Interoperability Programs Registration System.

- This warning banner provides privacy and security notices consistent with applicable federal laws, directives, and other federal guidance for accessing this Government system, which includes (1) this computer network, (2) all computers connected to this network, and (3) all devices and storage media attached to this network or to a computer on this network.
- This system is provided for Government-authorized use only.
- Unauthorized or improper use of this system is prohibited and may result in disciplinary action and/or civil and criminal penalties.
- Personal use of social media and networking sites on this system is limited as to not interfere with official work duties and is subject to monitoring.
- By using this system, you understand and consent to the following:
  - The Government may monitor, record, and audit your system usage, including usage of personal devices and email systems for official duties or to conduct HHS business. Therefore, you have no reasonable expectation of privacy regarding any communication or data transmitting or stored on this system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transmitting or stored on this system.
  - Any communication or data transmitting or stored on this system may be disclosed or used for any lawful Government purpose.

☐ Check this box to indicate that you acknowledge that you are aware of the above statements

Select the Continue button to go to the LOGIN page or select the Previous button to go back to the WELCOME page

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 to start the registration process
Step 2 – Login Instructions
Review the Login Instructions for Eligible Professionals.

**Login Instructions**

**Promoting Interoperability**

- CMS is dedicated to improving interoperability and patient access to health information. To better reflect this focus, the Promoting Interoperability Program is renamed to the Promoting Interoperability (HI) Program.

**Eligible Professionals (EPs)**

- If you are an EP, you must have an active National Provider Identifier (NPI) and have a National Provider Enrollment and Assessment System (NPPES) web user account. 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 NPPES web user account, navigate to NPPES to apply for an NPI and/or create an NPPES web user account.
- Users working on behalf of an Eligible Professional(s) must have an I&A Identity and Access Management System (I&As) web user account (user ID/password) and be associated in 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, **Create a Login** in the I&As System.

**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 have an Identity and Access Management System (I&As) web user account (user ID/password) and be associated in an organization NPI. If you are working on behalf of an Eligible hospital(s) and do not have an I&A web user account, **Create a Login** in the I&As 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 I&As System and use your NPPES user ID and password to request to work on behalf of an organization.
- 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 (I&As) web user account (user ID/password) can be associated to both an eligible professional NPI and an organization NPI. If you do not have an I&A web user account, **Create a Login** in the I&As System.

**Account Management**

- If you are an existing user and need to reset your password, visit the **I&As System**.
- If you are having issues with your User ID/Password and are unable to log in, please visit the Helpdesk: Medicaid Eligible Hospital and Eligible Professional Question and Answer or (855) 328-0292.
- Medicaid Eligible Professionals: Contact your State Medicaid Administrator.
- Medicaid Eligible Hospitals and Medicaid Eligible Professionals: Contact the Quality Payment Program Help Desk at (855) 289-8292 or QPPSupport@cms.hhs.gov.
- Medicaid Only Hospitals and Medicaid Eligible Professionals: Contact the Quality Payment Program legacy call option or QPPSupport@hhs.gov.

(*') Red asterisk indicates a required field.

**User ID:**

**Password:**

**Log In**  **Cancel**

**TIPS**

- **User ID and Password are case sensitive**

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Medicaid Eligible Professional User Guide – Page 5
Step 2 – Continued

For information about the CMS Identity and Access (I&A) System, refer to I&A Quick Reference Guide. The guide includes information on how to:

• Create an account
• Retrieve and reset usernames and passwords
• Register to access CMS systems on behalf of an organization
• Add and manage staff within an organization
• Work in CMS systems on behalf of an individual or organization

To locate your NPI number, visit: https://nppes.cms.hhs.gov/NPPES. User name and password are case sensitive.

To apply for an NPI click on "NPPES" link in the body of the screen.

If you cannot remember your password, contact the External User Services Help Desk at:
Phone: 1-866-484-8049, or
Web: https://eus.custhelp.com, or
Email: EUSSupport@cgi.com
Step 3 – Multi Factor Authentication (MFA)
If you have not already set up your MFA in I&A by March 28th, and the user name and password entered on the Login page are correct, you will be presented the “Information on Multi- Factor Authentication (MFA)” screen between March 28th, 2020 and September 30th, 2021.

STEPS
Eligible Professionals may choose to set up their MFA by selecting the “Go to I&A to set up MFA” button.
If the user has set up MFA in I&A, he/she will be not be presented this screen but will instead be directed to the next screen “Request Code for Multi- Factor Authentication (MFA)”

If the user clicks continue they will presented the Welcome Screen.

If the user clicks Go to I&A to set up MFA, the user is directed to I&A to set up MFA. When the user logs in again to the Registration System (after setting up MFA), they will be presented the “Request Code” screen after the “Login Instructions” screen.
Step 4 – Request Code for Multi-Factor Authentication (MFA)

If the user name and password you entered are correct, and you have set up MFA in I&A, you will be presented the “Request Code for Multi-Factor Authentication (MFA)” screen after March 28th, 2020.

**STEPS**

Eligible Professionals can select the method by which they would like to receive the verification code.

Click *Send Verification Code*.
**Step 5 – Verify Code for Multi-Factor Authentication (MFA)**

**STEPS**

Screen will be presented to the user.

The user also has to option to click the *Resend* button to receive the code again.
Step 6 – Consent

Eligible Professionals can choose if they want install cookies on their private devices, which will let them bypass the MFA for the next 24 hours.

Click Consent Verification Code
Step 7 – Welcome
If your login was successful you will receive the “Welcome Screen”.

Although registration is done in this system, the demonstration and attestation to Meaningful Use (MU) of Certified Electronic Health Record Technology (CEHRT) by providers, and obtaining the qualified EHR Incentive payment, is done with the Promoting Interoperability program of the Medicaid Affiliated State or Territory that the providers choose to register with in this system.

TIPS

The Welcome screen consists of three tabs to navigate through the registration process

- Home
- Registration
- Status
Step 8 – Registration

The Registration Instruction screen lists all the National Provider Identifiers (NPI) associated to the logged in user.

**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 9 – Reason for this Registration
Review and follow the registration instructions below.

Reason for Registration
You are an Eligible Professional registering in the incentive program.

Topics
The data required for this registration is grouped into topics. In order to complete registration, you must complete ALL of the following topics. Select the TOPIC and provide the required information. The system will show when each TOPIC is completed.

1. Promoting Interoperability Program
   Progress: 0 of 1
2. Personal Information
   Progress: 0 of 1
3. Business Address & Phone
   Progress: 0 of 1

Note: When all topics are marked as completed, select the Proceed with Submission button to submit your registration.

TIPS
- Data required for this registration is grouped into two topics. Both topics must be completed.
- Progress bars will indicate the progress.
- When both topics are completed, user can select Proceed with Submission.
Step 10 – Promoting Interoperability Program Questionnaire

**MEDICAID STATE/TERRITORY:**

Select

**PLEASE SELECT YOUR ELIGIBLE PROFESSIONAL TYPE:**

Select

The Promoting Interoperability Program requires the use of EHR technology certified for this program. Please visit the CMS website for additional information on certified EHR technology.

Note: A certified EHR is not required to complete the registration process. Please see help topics for the list of valid CEHRT before asking help.

**DO YOU HAVE A CERTIFIED EHR?**

Yes  No

EHR Certification Number (Optional):

Please select the Previous button to go back a page. Please note that any changes that you have made on this page will not be saved. Please select the Save & Continue button to save your entry and proceed.

Click **Save & Continue**
Step 11 – Personal Information

Follow the instructions below regarding your personal information.

### Personal Information

#### Eligible Professional Identifiers
- **First Name:** George
- **Middle Name:** Dimitri
- **Last Name:** Magel

#### Social Security Number (SSN)
- **SSN:** XXX-XX-2845

#### National Provider Identifier (NPI)
- **NPI:** 1265765485

### Payee Information

Please note, the tax identification number (TIN) captured below will receive the Promoting Interoperability Program payment.

*Please select the payee TIN type for your Promoting Interoperability Program Registration.*

<table>
<thead>
<tr>
<th>TIN Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN</td>
<td>Normal TIN</td>
</tr>
<tr>
<td>Group</td>
<td>Group Reassignment</td>
</tr>
</tbody>
</table>

#### TIPS
- Medicaid EPs can elect to have their payment go to another qualified entity using Payee TIN Type of Group Reassignment. 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](http://www.cms.gov/EHRIncentivePrograms)

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**STEPS**

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

- **SSN Payee TIN Type** indicates that the provider receives the payment.
- To reassign to a Group, select Group Reassignment in the payee TIN Type.
- Click **Save & Continue**.
Step 12 – Business Address and Phone Number

The business address and telephone number are pulled from the provider’s information 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 E-Mail address

Click *Save & Continue*

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

**TIPS**

- The fields can be updated on this screen. However, the data is not sent back to NPPES. If this information is incorrect, please update your NPPES account as well.

- The *Business Address* cannot be a P.O Box address
Step 13 – Registration Progress
Topics for this Registration page will display when all the Topics are completed.

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

**Tips**
- Data required for this registration is grouped into three topics. All topics must be *completed*.
- Progress bars will indicate the progress for each topic.
- When all topics are *completed*, the user can select *Proceed with Submission*.

Reason for Registration
You are an Eligible Professional registering in the incentive program.

Topics
The data required for this registration is grouped into topics. In order to complete registration, you must complete ALL of the following topics. Select the TOPIC and provide the required information. The system will show when each TOPIC is completed.

1. Promoting Interoperability Program
   - Progress: 1 of 1
   - Completed

2. Personal Information
   - Progress: 1 of 1
   - Completed

3. Business Address & Phone
   - Progress: 1 of 1
   - Completed

Notes: When all topics are marked as completed, select the *Proceed with Submission* button to submit your registration.
Step 14 – Verify Registration

Be sure to verify all your personal information.

**STEPS**

Review your registration information for accuracy

Click *Submit Registration* to continue

If you decide not to complete your registration at this time, you may click the *Exit* button, which will take you back to the Home Page

Your registration information will not be sent to your Medicaid State or Territory for processing of your attestation or incentive payments if the ‘Submit Registration’ button is not clicked

**TIPS**

- *If you decide not to complete your registration at this time, you may click the Exit button, which will take you back to the Home Page*
- *Click on Help link for additional guidance for the registration process*
Step 15 – 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 16 – Submission Receipt

Confirm that your registration was completed successfully.

STEPS

Successful Submission:
You must contact your State to complete your registration
Continue your registration using the State’s Medicaid EHR registration tool

Failed Submission:
Read the instructions on the screen and contact the appropriate department to correct your information

TIPS
• Wait 24 hours to contact your State to finish the registration, to allow for processing
• Click ‘Print Receipt’ to get a copy of the receipt for your records
• An unique Registration ID will be assigned to your submission
• If any of the system validations fail, the registration will be set to a status of “Rejected” or “Issue Pending”
Step 17 – Status Summary

Review all current and previous information related to your account.

STEPS

Click the Status tab to view registration information
Click the Select button in the Action column to view the registration details
Step 18 – Status Information

Review the details of your registration process.

Status Information

The following outlines the most recent events associated with your participation in the Promoting Interoperability Program through program year 2016.

For additional information on your registration, attestation(s), and payment(s), please select the appropriate tab.

<table>
<thead>
<tr>
<th>Incentive Type</th>
<th>Registration Status</th>
<th>Status Reason</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEDICAID</td>
<td>Medicaid Validation</td>
<td>Pending State</td>
<td>Medicaid - Registration has been saved and will be sent to the state for review</td>
</tr>
</tbody>
</table>

Registration ID: 1000063467
Provider Name: George M.
Payee TIN: XXX-XX-2845
NPI: 1265766428
Registration Status: Medicaid - Pending State Validation

Business Address:
Houston, TX 77030 3411
Phone #: (713) 788-0510 Ext: 0
E-Mail: Jane.Doe@email.com
Contractor ID: N/A
NPI/Career/MAC: N/A
Medicaid State/Territory: AS

TIPS

- **Registration Status will be “Pending State Validation” until the registration process is completed at the Medicaid State**
- **Other Registration Statuses are “Issue Pending”, “In Progress” and “Rejected”**
- **The status reason is listed under the blue header in the center of the screen**
- **Click ‘Previous’ to return to the status selection page**
Have Questions?
There are many resources available to you. Use the Help link in the Registration System or check out the FAQ on the CMS PI Program Website.

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

Resources
Contact the NLR Help Desk for Questions concerning registration by:
  Email at NLRProdSupport@cms.hhs.gov, OR
  Phone at 1-833-238-0203
  Hours of operation: Monday-Friday 8 AM – 5 PM Eastern Time (except on Federal holidays)

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

TIP
For more information on the Promoting Interoperability Program, visit http://www.cms.gov/EHRIncentivePrograms
## Acronym Translation

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Expansion</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMS</td>
<td>Centers for Medicare &amp; Medicaid Services</td>
</tr>
<tr>
<td>EHR</td>
<td>Electronic Health Record</td>
</tr>
<tr>
<td>EIN</td>
<td>Employee Identification Number</td>
</tr>
<tr>
<td>EP</td>
<td>Eligible Professional</td>
</tr>
<tr>
<td>I&amp;A</td>
<td>Identification &amp; Authentication System</td>
</tr>
<tr>
<td>LBN</td>
<td>Legal Business Name</td>
</tr>
<tr>
<td>MAC</td>
<td>Medicare Administrative Contractor</td>
</tr>
<tr>
<td>NPI</td>
<td>National Provider Identifier</td>
</tr>
<tr>
<td>NPPES</td>
<td>National Plan and Provider Enumeration System</td>
</tr>
<tr>
<td>NLR</td>
<td>National Level Repository</td>
</tr>
<tr>
<td>PI</td>
<td>Promoting Interoperability</td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>TIN</td>
<td>Tax Identification Number</td>
</tr>
</tbody>
</table>