Enrolling in Annual Reporting

Making sure you are set up to sustain your PCMH Recognition.

WHO IS THIS FOR?

Anyone who will be managing the Annual Reporting process for sites enrolling to sustain its PCMH Recognition.

THE BIG PICTURE

There are seven Q-PASS steps to enrolling for sustaining Recognition:

☐ 1. Make sure all your practice sites are visible in Q-PASS and are ready to enroll.

☐ 2. Enroll each practice site.

☐ 3. Make sure practice-site details and NPIs are entered.

☐ 4. Sign the Agreements.

☐ 5. Add or link your clinicians.

☐ 6. Create and pay the invoice.

☐ 7. Setting up Site Groups, Shared Credits and Transfer Credits.
Enrolling in Annual Reporting

STEP 1

Go to qpass.ncqa.org

If you haven’t enrolled an organization yet, click **Click here to enroll your organization in a program.**

If you want to enroll a practice with current Recognition (for example, PCMH 2014 Level 3), **Click here to learn more** and then **Click to enroll.**
On the *Program List* screen, click to choose a program.

If you are interested in getting recognized as a PCMH, click *Enroll* below the product description.

If you are interested in a Distinction in Behavioral Health AND

- are renewing your PCMH Recognition, first complete your PCMH enrollment and then return to this screen to Enroll for Distinction in Behavioral Health
- have a current NCQA PCMH Recognition, click *Enroll* next to Distinction in Behavior Health Integration
Enrolling in Annual Reporting

Review the next screen carefully; it explains the difference between a “single site” organization and a “multi-site” organization. You will use this information later on.

Once you have determined which Organization type you are, click the Begin Enrollment button.

Update practice site details on the Practice Sites screen.

A red exclamation mark icon next to the site name means that information is missing. To enter information, click the Edit details button.
Enrolling in Annual Reporting

All fields shown here with a green checkmark are required. If information is already populated, be sure to check that it is correct. If information is missing, enter the needed information.

As you scroll down the screen, you will be asked to choose a specialty. Click a box to choose a specialty from the list that displays on the Specialty screen. Click Save.

**HINT:** Typically only three specialties apply to PCMH: Internal Medicine, Gen/Fam Practice, Pediatrics.

Note: If you have a sponsor or discount code, you will see an area to enter it. If you don’t have one or don’t know it, just leave it blank.

When information has been added, click Save.
Enrolling in Annual Reporting

When all sites have been added, they must be enrolled—this confirms that you want the site included in the Recognition process.

Click to select the box next to the site name. Click Next >.

For any questions throughout the process, you can contact NCQA Customer Support via the “Ask a Question” link at the bottom of the page or calling (888) 275-7585.
You are now on the **Sign Legal Agreements** screen. These Agreements, the Business Associate Agreement and the program Agreement, need signing by an authorized party.

To begin, click the **View & Sign** button for the first document.
Enrolling in Annual Reporting

If you are the authorized signer, click to check the box next to **I am authorized to sign.**

If you are not the authorized signer, click **Not authorized? Click here to invite a new user to sign this agreement for your organization.**

After you enter the authorized signer’s information, the authorized signer will receive an email requesting their signature. The authorized signer should follow the instructions in the email and will be able to sign the required documents.
Enrolling in Annual Reporting

1. To sign electronically, enter your title and click to check that you have read the Agreement.
2. Another option is to download and sign the Agreements. To download: Click here to download the agreement. Sign the Agreement and your NCQA Representative will help you upload it.

Click Return to list to return to the previous screen and sign the PCMH 2017 Agreement.

After both Agreements have been signed, click Next >.
STEP 5  Adding Clinicians.

Now it’s time to add your clinicians. On the Clinicians screen, click **Manage Clinicians**.

To add a new clinician, click **Add a New Clinician**.

The clinicians associated to your previous recognition will be under **Add an Existing Clinician**.

Each time you add a clinician, you will get a pop-up window displaying the cost. Just click **OK** to continue.
Enrolling in Annual Reporting

When you use **Add an Existing Clinician**, the screen alphabetically displays all clinicians associated with your site’s previous Recognition and your parent organization.

Click to check the box for each clinician you want to be associated with the site for the new Recognition.

All clinician records require a birthdate, credential and license number. If you get a message that a clinician is missing required information, click the pen icon in the lower right.
Add the missing information and board specialty. Click to check the box: **The clinician attests to meaningful participation** … Click **Next >**.

To add a new clinician, click **Add a New Clinician**. Enter the clinician’s NPI number or click **Lookup My NPI** to find it in the NPI Registry.
Enrolling in Annual Reporting

Adding the NPI number will populate many of the required fields, then you must enter the required fields that do not populate: date of birth, credentials, license number and license state.

Be sure to enter at least one board & specialty for each clinician. Click **Add Board/Specialty**.

Click **Board**… to select the clinician’s board from the drop-down menu. Enter the board number (this number is not the same as the NPI number).
Enrolling in Annual Reporting

If the clinician is not a member of a board, click N/A at the bottom of the list.

Click to select the clinician's specialty from the drop-down menu. The clinician's specialty is required even if the clinician is not a member of a board. Click Save Board/Specialty.

After all clinician information is entered, click Save Clinician.
When you have entered the information for all eligible clinicians at the practice site, click Done. The Clinician Count will display the updated number of clinicians. Click Next >.

For any questions throughout the process, you can contact NCQA Customer Support via the “Ask a Question” link at the bottom of the page or calling (888) 275-7585.
STEP 6 Creating & Paying an Invoice

HINT: Click on each bar at the top of the screen to read the instructions - they provide a lot of helpful information. Hover your cursor over the amount to see the Evaluation Mode and number of clinicians included in the line item.

If your practice is participating in a sponsored initiative such as HRSA or TN CARE, or is a Partner in Quality, don’t forget to apply your discount code before creating the invoice. Click Apply Discount. Enter the discount code in the pop-up window.
Once you submit the discount code, approval may be pending, depending on the sponsor’s preference to approve each individual practice site using its sponsor code. When the sponsor approves the discount, the sponsor code will display and you will see the option to create an invoice.

**STEP 6 Part 2 Paying the Invoice.**

Click **Create Invoice**.

Click **Actions**. From the drop-down menu, click **Pay Invoice**.
Enrolling in Annual Reporting

The invoice will display in a new window. Scroll to the bottom of the page to enter payment details.

Accept the terms and conditions and enter your name in the field. Click Accept and Pay Online to add payment information.

After you create the invoice, the status displays as Paid. Click Next >.
Enrolling in Annual Reporting

Review your enrollment to verify that you have enrolled in the right program, confirm the number of enrolled sites and make sure you have signed both Agreements.

For any questions throughout the process, you can contact NCQA Customer Support via the “Ask a Question” link at the bottom of the page or calling (888) 275-7585.
STEP 7 Setting up Site Groups, Shared Credits and Transfer Credits.

You’re almost done! The enrollment wizard will now take you through the Set Up Site Groups (if you are enrolling multiple sites), Shared Credits and Transfer Credits screen.
For accounts with single sites: Skip to page 24. This is the section on Transfer credits where you can apply for prevalidation credit from vendors and other resources you already work with.

For accounts with multiple sites: You must identify a primary site. The primary site provides shared evidence for all secondary sites. If you are enrolling more than one site, click Next > to get to this page.

HINT: Most organizations only need to create one site group, especially if you share an EHR.

If you have questions or want to learn more about creating multiple site groups, you should stop here and contact NCQA either using your my.ncqa account or calling (888) 275-7585.

To create additional site groups, click New. Enter a name for the site group. Drag and drop the enrolled sites from the All sites menu. Click Save. Click Next >.

REMINDER: In most cases, you only need multiple site groups if you are using different EHRs.
Enrolling in Annual Reporting

You are now on the Shared Components screen, click **more** to expand the view of **Do any of your sites share evidence?** Read the information on adding shared components.

Find the right program under **Shared Credits**. For PCMH, click **PCMH: Patient-Centered Medical Home Recognition Criteria** for transform.

Click **PCMH AR: Annual Reporting Requirements** for **Patient-Centered Medical Home** for Annual Reporting.

Click the plus sign to expand the program information.
Enrolling in Annual Reporting

Click the plus sign to expand a concept. All components that can be shared will display.

Click to select a component that aligns with how your organization shares processes and procedures.

After you have selected a component, click to check **All sites**. Do this for all shared components. Continue doing this for all shared components.
Enrolling in Annual Reporting

All components you add will display under **All of my organization’s sites**. When you have added all components, click **Next >**.

**TRANSFER CREDITS**

The screenshot displays only a few vendors, in reality, you will see a comprehensive list of all the available prevalidated sources and vendors.
Drag and drop your vendor’s product implementation letter into the box supplied for upload, or upload the letter from your computer. Click **Done**.

After uploading the product implementation letter, click **Submit for review**. Your status displays as **Review pending**.
Enrolling in Annual Reporting

On the Complete Organization Setup screen, click to check **I have finalized these site groups and shared criteria…**

Click **We’re ready**.

**REMINDER:** Any future changes to your site groups or shared components will need to be done by your assigned NCQA Representative.

For any questions throughout the process, you can contact NCQA Customer Support via the “Ask a Question” link at the bottom of the page or calling (888) 275-7585.
You should now be back on the Organizational Dashboard. Congratulations! You are ready to upload your evidence.

Note: If you see the screen that say “You haven’t finished setting up your organization”, then your enrollment is not complete. Click Here to finish setting up your Organization.

For any questions throughout the process, you can contact NCQA Customer Support via the “Ask a Question” link at the bottom of the page or calling (888) 275-7585.
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