PRIMARY CARE FIRST (PCF) PRACTICE PORTAL HEALTH IT USER GUIDE

Version 4
January 19, 2023

Updates in this Release

Table or Section	Update	Page
Introduction	Rearranged the steps to accommodate recent changes to the Health IT Vendor Point of Contact Table in the Health IT Details tab on the PCF Practice Portal.	5
Step 6 (previously Step 5)	Removed the measures tables and registry fields. MIPS CQM Reporting Mechanism has been renamed to eCQM Reporting Mechanism and is only visible to Practice Risk Groups 1 and 2.	16
Steps 1 – 7	Updated instructions and figures to reflect several changes in the PCF Practice Portal that streamlined Vendor Roster and Health IT Vendor Point of Contact Table functionality.	6-18

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Introduction to the Primary Care First (PCF) Practice Portal Health IT User Guide

The Primary Care First (PCF) Practice Portal stores information about your practice that is vital to participation in PCF. The Health IT Details tab on the PCF Practice Portal stores information about your use of health IT. This information must be kept current to accurately represent your practice's approach to meeting the PCF health IT requirements described in your signed Participation Agreement. The Health IT Details tab must be completed by a PCF Practice Portal authorized user who is familiar with the health IT vendors and products used by your practice.

The PCF Practice Portal Health IT User Guide provides step-by-step instructions on how to access and navigate the Health IT Details tab, whether completing it initially or updating it when changes occur.

The PCF Practice Portal Health IT User Guide helps you complete the following steps:

- **Step 1:** Access the Health IT Details Tab in the Primary Care First Practice Portal
- **Step 2:** Update the Vendor Roster
- **Step 3:** Add or Update Health IT Vendor Information
- **Step 4:** Select Your Primary and eCQM Reporting Health IT Vendor
- **Step 5:** Identify Your Primary and eCQM Reporting Vendor Points of Contact
- **Step 6:** Add or Update eCQM Reporting Mechanism Information
- **Step 7:** Add or Update Health IT Requirements Status
- **Step 8:** Complete the Confirmation Section

If you have any questions or concerns about the information provided in this guide, please contact PCF Support at 888-517-7753 or PCF@telligen.com for assistance.

Step 1: Access the Health IT Details Tab in the Primary Care First Practice Portal

Follow steps 1.1 through 1.5 to access the Health IT Details tab:

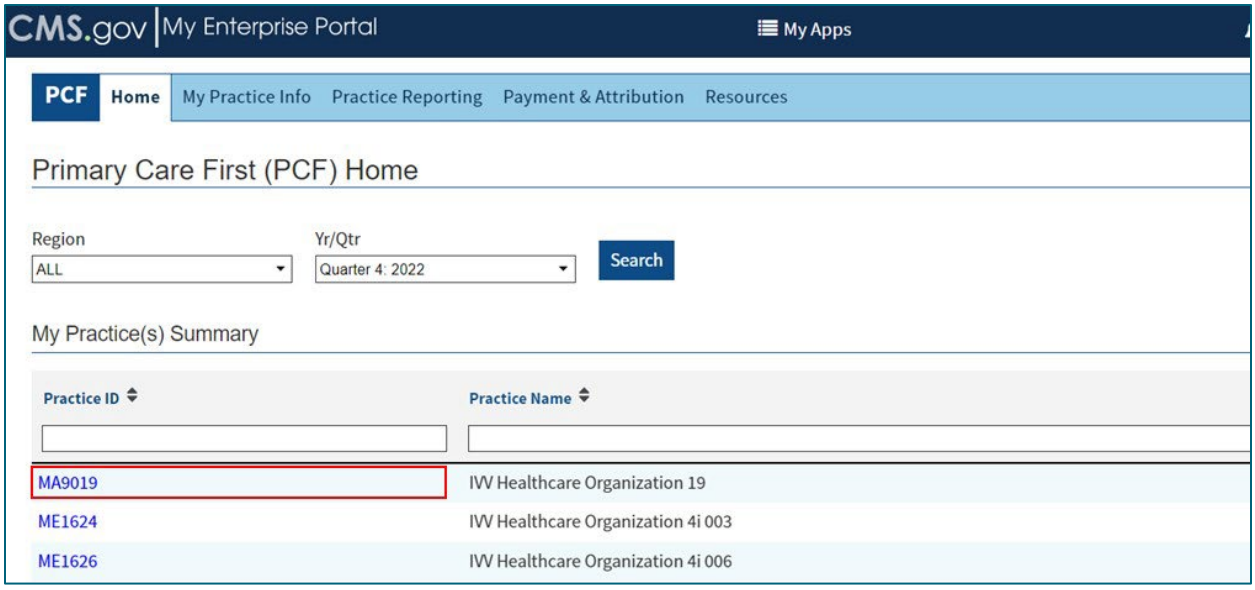
1.1 Go to https://portal.cms.gov/.

1.2 Click the **Login** button to open the Centers for Medicare & Medicaid Services Secure Portal.

1.3 After logging in, select **Innovation Center**, select **Application Console**, and select the tile labeled **PCF Primary Care First (PCF)** to launch the PCF Practice Portal.

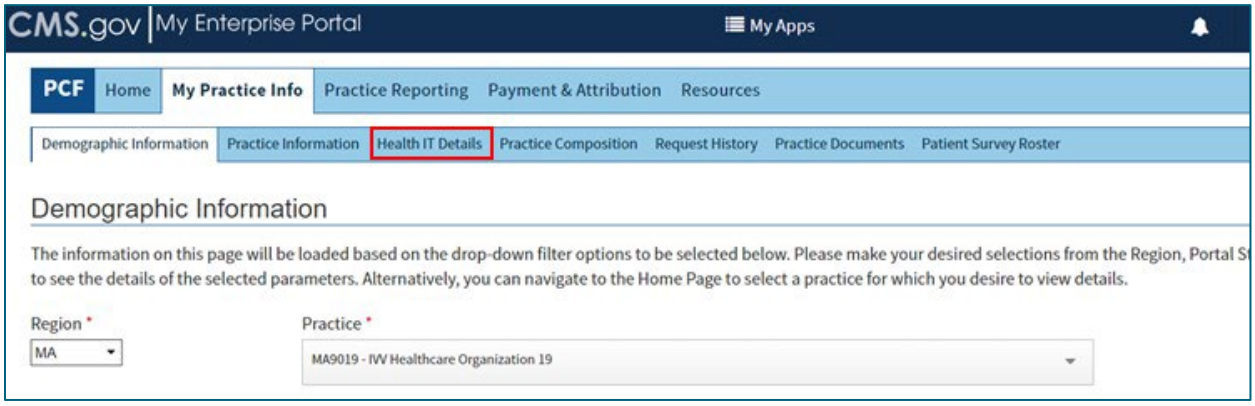
1.4 To edit the health IT information of a specific practice, select a Practice ID in the **Practice ID** column of the summary table as shown in Figure 1.

Figure 1: Primary Care First Home



1.5 Go to the **Health IT Details** tab as shown in Figure 2.

Figure 2: My Practice Info—Health IT Details Tab



Step 2: Update the Vendor Roster

The Vendor Roster should include your primary and electronic Clinical Quality Measure (eCQM) reporting health IT vendors only. Practices in Risk Groups 3 and 4 are not required to have an eCQM reporting health IT vendor for the PCF model. Table 1 shows health IT vendor types and descriptions required for PCF practice designations. For more health IT requirements, please refer to **PCF Clinical Measure Reporting and Health IT Requirements Summary** document, posted on PCF Connect for each performance year.

Table 1: Health IT Vendor Types and Descriptions

Health IT Vendor Type	Description
Primary health IT vendor (required for all practices)	Typically the health IT vendor that constitutes Certified EHR Technology (CEHRT) or is used in combination with other health IT systems to meet the CEHRT definition
eCQM reporting health IT vendor (Practice Risk Groups 1 and 2 Only)	The health IT vendor used to report eCQM results

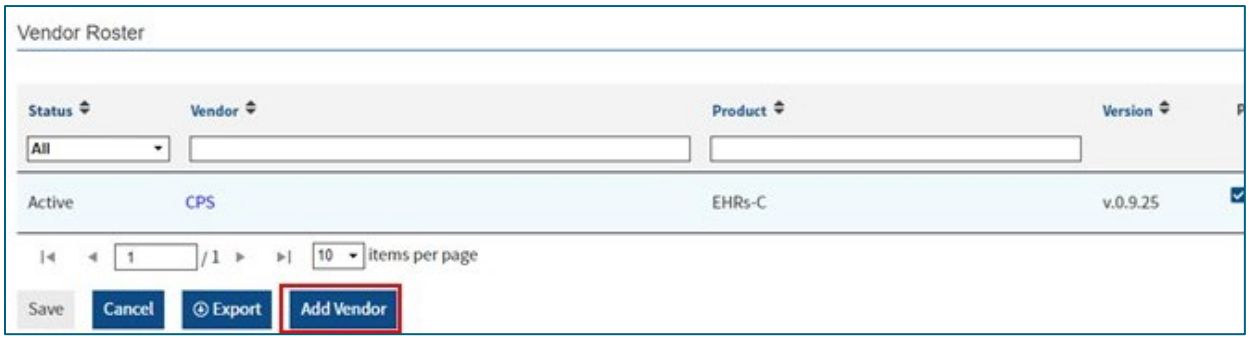
Changes you can make to your practice's Vendor Roster include the following:

- **Add a health IT vendor:** Follow the navigation instructions provided under Add Health IT Vendor to populate your Vendor Roster at the beginning of your PCF participation. You should also follow these instructions if you need to add a new health IT vendor during your PCF participation.
- **Update information for an active health IT vendor:** Follow the navigation instructions provided under Edit Health IT Vendor Information to update the product name, version, or certification status for an existing active health IT vendor.
- **Delete a health IT vendor:** If you no longer use a vendor you previously recorded in the Vendor Roster, follow the navigation instructions provided under Delete Health IT Vendor to delete the vendor.

Update the Vendor Roster—Add Health IT Vendor

2.1 To add a health IT vendor, click the **Add Vendor** button as shown in Figure 3.

Figure 3: Update the Vendor Roster—Add Health IT Vendor

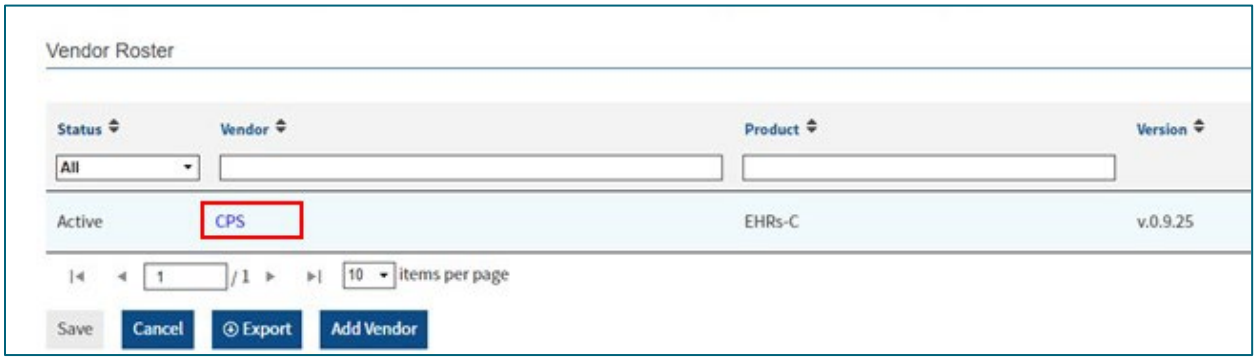


2.2 Go to Step 3 to add health IT vendor information.

Update the Vendor Roster—Edit Health IT Vendor Information

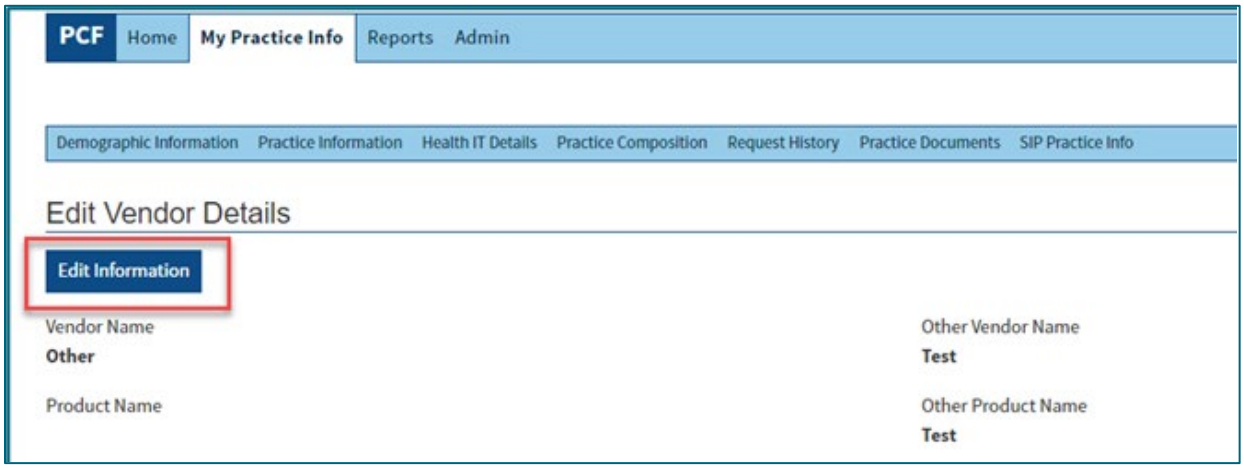
2.3 To update information for an existing active health IT vendor, select the hyperlinked health IT vendor as shown in Figure 4.

Figure 4: Update the Vendor Roster—Select Vendor



2.4 Click the **Edit Information** button as shown in Figure 5.

Figure 5: Update the Vendor Roster—Edit Information

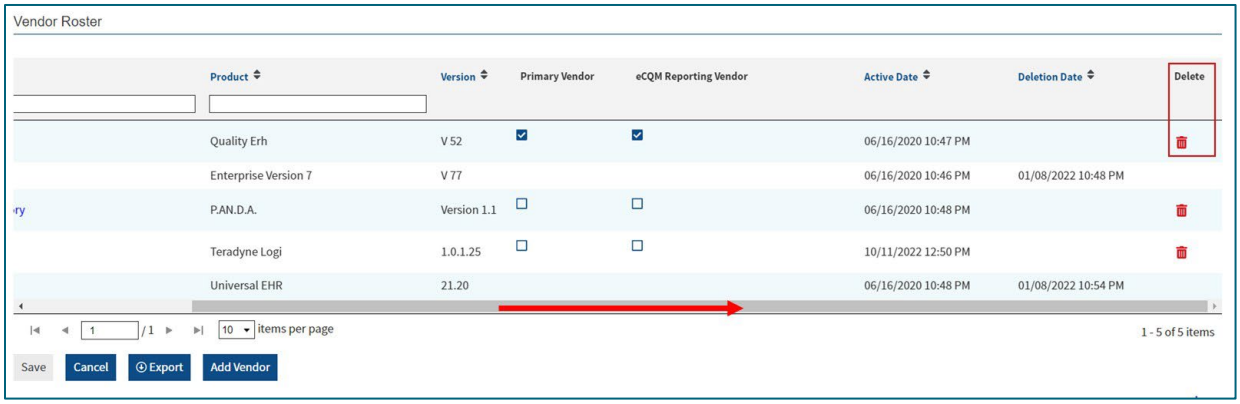


2.5 Go to Step 3 to add health IT vendor information.

Update the Vendor Roster—Delete Health IT Vendor

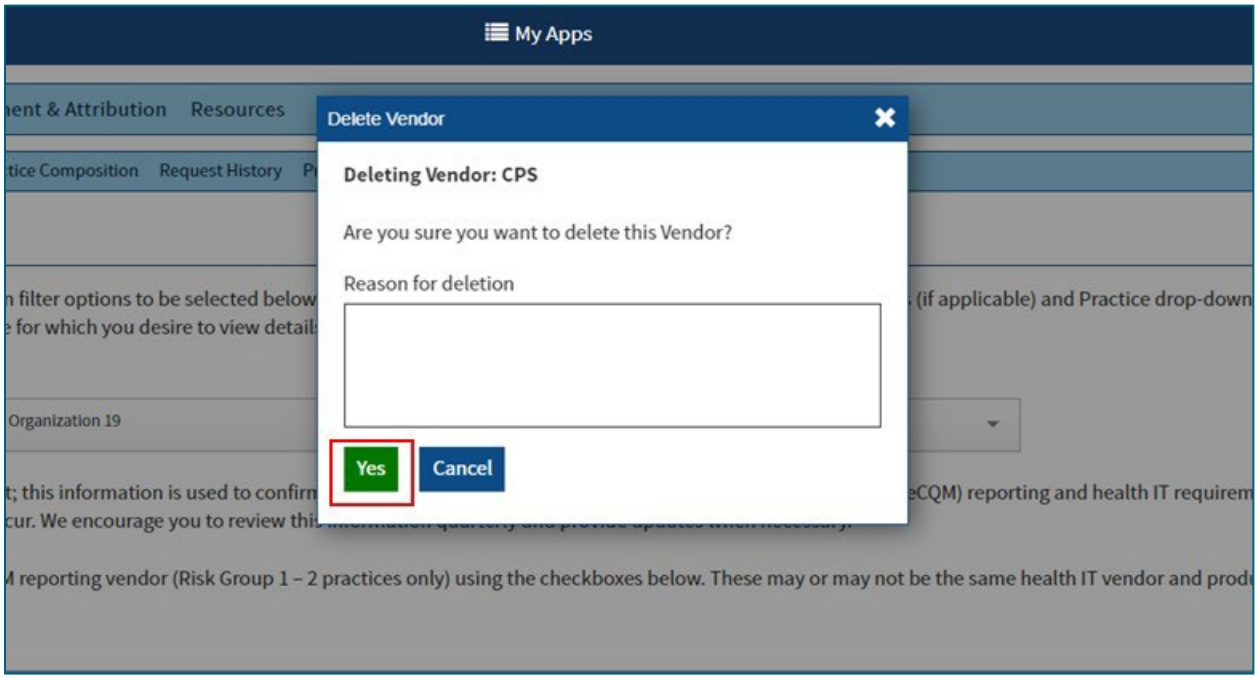
2.6 Drag the scroll bar to the right until you see **Delete** as shown in Figure 6. To delete a health IT vendor, click the trash can icon as shown in Figure 6.

Figure 6: Update the Vendor Roster—Delete Health IT Vendor



2.7 A confirmation box will appear on your screen as shown in Figure 7. Type in your reason for deleting (optional), then click the **Yes** button to delete a health IT vendor. This action will change the status of the health IT vendor from Active to Deleted.

Figure 7: Update the Vendor Roster—Confirm Vendor Deletion



Step 3: Add or Update Health IT Vendor Information

This section includes four fields: **Vendor Name**, **Product Name**, **Version**, and **CHPL Product Number**. All four fields must be completed before saving your entry. The drop-down options for each of these fields is linked to the Office of the National Coordinator for Health IT (ONC) Certified Health IT Product List (CHPL).

To simplify completion and ensure accuracy, menu options for these fields are dependent on the previous selection. For example, once you select a health IT vendor, only product names associated with that vendor will appear in the drop-down list for the Product Name field. If you are unable to find a match on the drop-down list in any of these fields, type in "Other" and a free text field will appear for you to type in your response. Instructions for entering items in the **Vendor Information** section are listed below and shown in Figure 8.

Helpful Note: Starting with PY 2023, all practices must use 2015 Edition Cures Update health IT to meet the Certified EHR Technology (CEHRT) definition. Health IT vendor information in fields 1 through 4 (Figure 8) must match the information available in the ONC CHPL.

3.1 Type the name of your health IT vendor in **Vendor Name,** which is a search-as-you-type field. If the name does not appear, type in and select **Other**, then

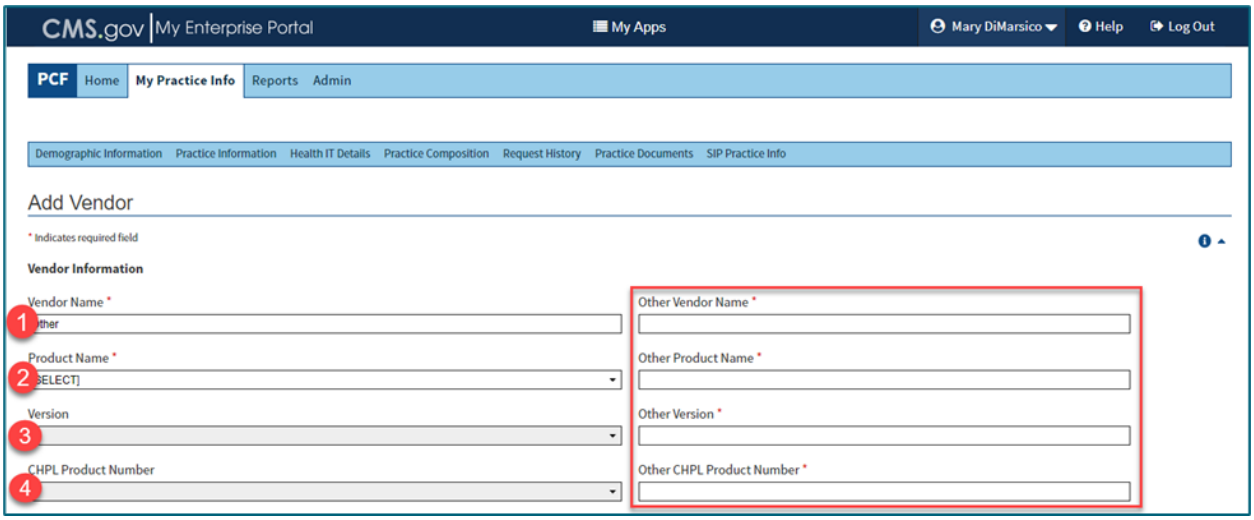
enter the health vendor name in the **Other Vendor Name** field that will be displayed to the right. See item 1 in Figure 8.

3.2 Select the **Product Name** you use from the drop-down menu. If the product name you use does not appear on the list, type in and select **Other**, then enter the product name in the **Other Product Name** field that will be displayed to the right. See item 2 in Figure 8.

3.3 Select the **Version** of the health IT product you use from the drop-down menu. If the version you use does not appear on the list, type in and select **Other,** then enter the version in the **Other Version** field that will be displayed to the right. See item 3 in Figure 8.

3.4 Select the **CHPL Product Number** of your health IT product from the drop-down menu. If the CHPL product number you use does not appear on the list, type in and select **Other,** then enter the product number in the **Other CHPL Product Number** field that will be displayed to the right. See item 4 in Figure 8.

Figure 8: Add Vendor Information, Part 1

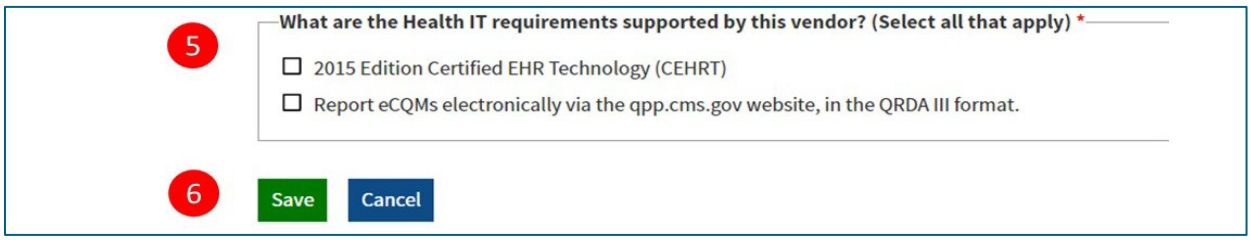


Next, you'll need to respond to the question shown in Figure 9 in relation to the health IT vendor you just entered and save your information.

3.5 Confirm whether the selected health IT vendor supports 2015 Edition Cures Update CEHRT requirement and/or reporting of eCQMs via submission of a Quality Reporting Document Architecture (QRDA) Category III file (practice Risk Group 1 and 2 only) by selecting the appropriate check boxes. See item 5 in Figure 9.

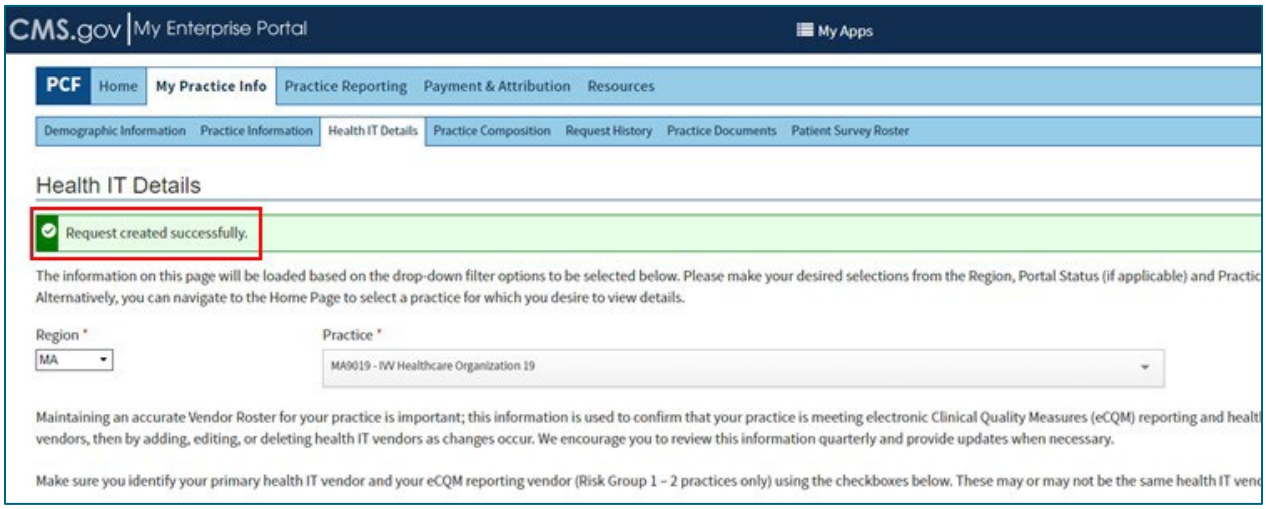
3.6 To save and activate your health IT vendor, click the **Save** button. See item 6 in Figure 9.

Figure 9: Add Vendor Information, Part 2



3.7 After adding or updating and then saving the health IT vendor information, you will be directed back to the main Health IT Details page where you will see a confirmation banner, "Request created successfully," at the top of the page, as shown in Figure 10.

Figure 10: Vendor Information—Request Created Successfully



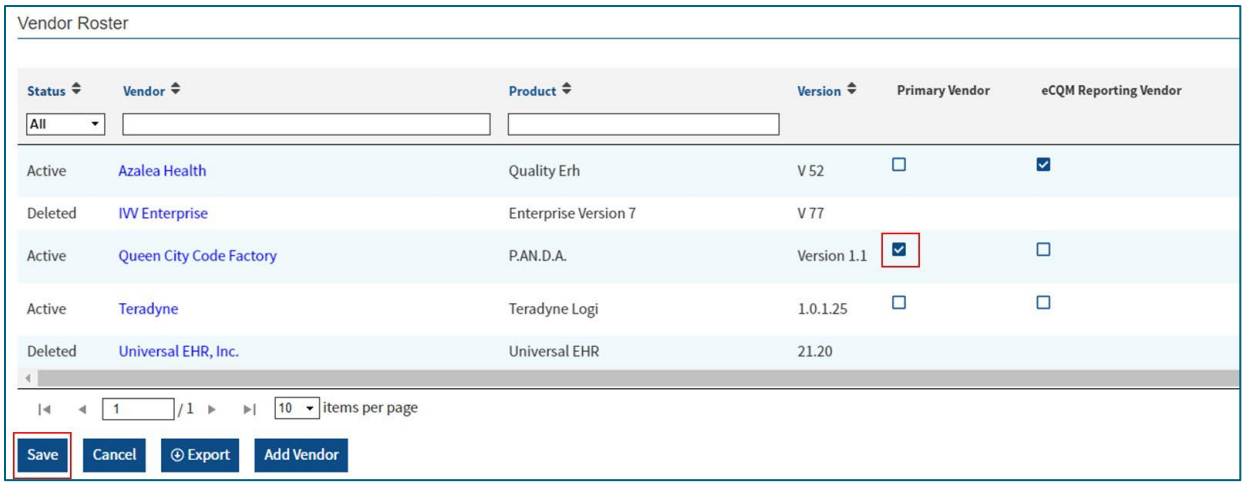
Step 4: Select Your Primary and eCQM Reporting Health IT Vendor

This step will take you through how to select your primary and eCQM reporting health IT vendor.

4.1 To select a primary health IT vendor, click the **Primary Vendor** checkbox and click on the Save button to save your selection, as shown in Figure 11.

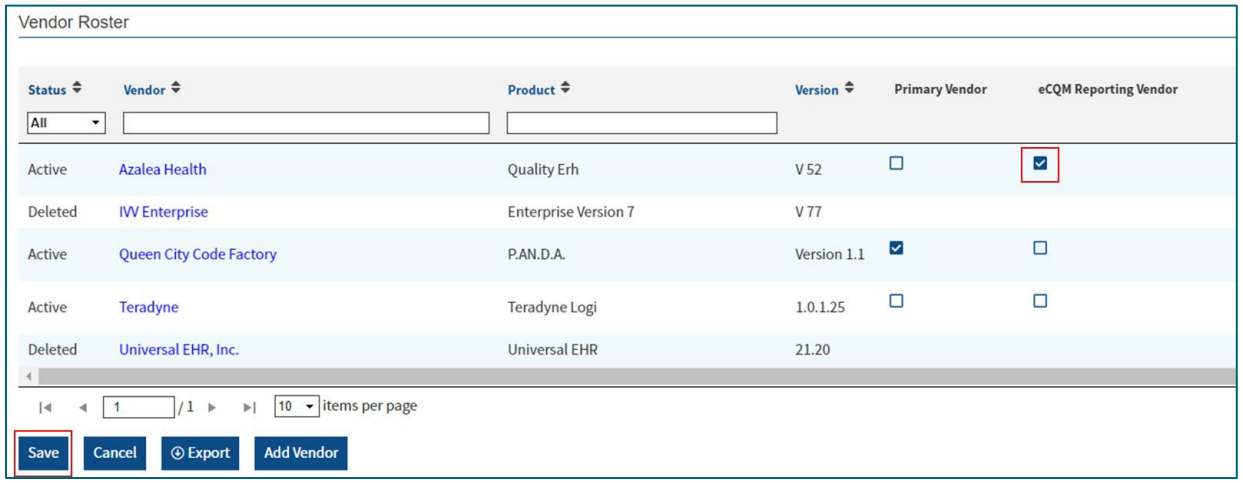
Helpful Note: Your practice can only have one active primary health IT vendor and (for Risk Group 1 and 2 practices) one eCQM reporting health IT vendor at a time. Your eCQM reporting health IT vendor can be the same as your primary health IT vendor.

Figure 11: Health IT Details—Select Primary Vendor



4.2 Similarly, click the **eCQM Reporting Vendor** checkbox to select your eCQM reporting health IT vendor and click the Save button to save your selection, as shown in Figure 12. Only Practice Risk Groups 1 and 2 will see this option.

Figure 12: Health IT Details—Select eCQM Reporting Vendor



Step 5: Identify Your Primary and eCQM Reporting Vendor Points of Contact.

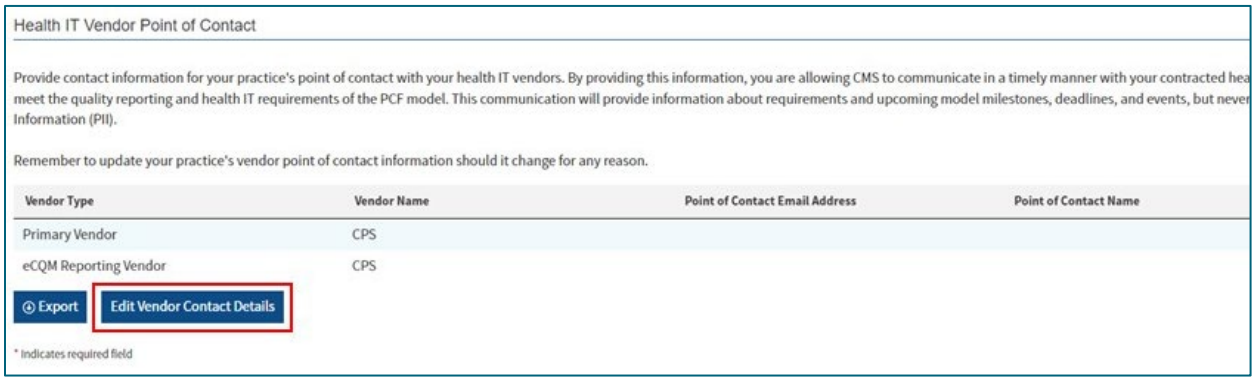
This step will show you how to enter applicable primary and eCQM reporting vendor point of contact (POC) information. eCQM reporting vendor POC information applies to practices in Risk Groups 1 and 2 only.

Important Note: By providing this information, you are allowing the PCF model to send communications to your health IT vendors to facilitate their efforts to support your practice(s) in meeting the PCF eCQM reporting and health IT requirements. The communication will provide information about model requirements and upcoming milestones, deadlines, and events, but never protected health information (PHI) or personally identifiable information (PII).

Follow these steps to enter POCs for your primary and eCQM reporting (if applicable) health IT vendors:

5.1 To begin entering contact information for your primary and, if your practice is in Risk Group 1 or 2, your eCQM reporting vendor, select **Edit Vendor Contact Details** as shown in Figure 13.

Figure 13: Health IT Details—Primary and eCQM Reporting Vendor Point of Contact

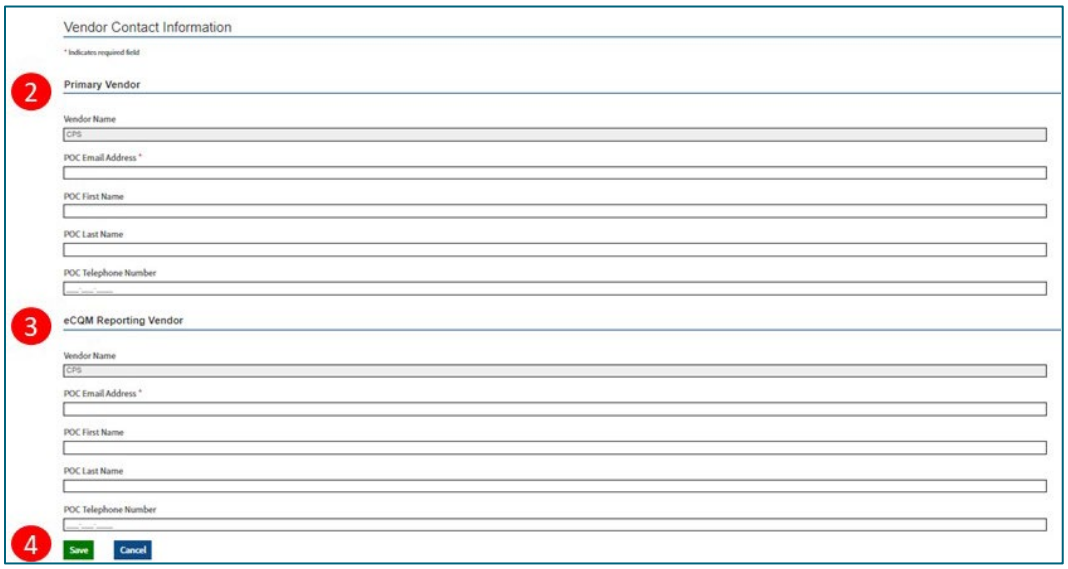


5.2 Enter the POC Email Address, POC First Name, POC Last Name, and POC Telephone Number for your Primary Health IT Vendor in the text boxes, as shown below in Figure 14.

5.3 If applicable, enter the POC Email Address, POC First Name, POC Last Name, and POC Telephone Number for your eCQM Reporting Vendor in the text boxes, as shown below in Figure 14.

5.4 To save your POCs, click the **Save** button.

Figure 14: Health IT Details—Primary and eCQM Reporting Vendor POC



Step 6: Add or Update eCQM Reporting Mechanism Information

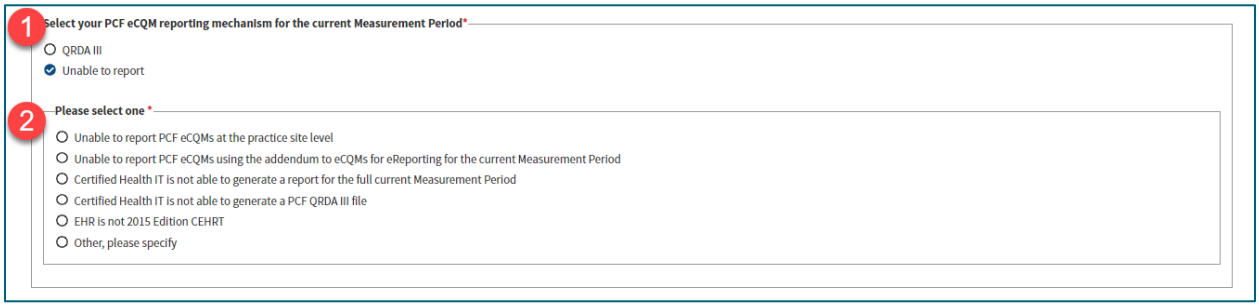
Only practices in Risk Groups 1 and 2 will see and need to enter information in this section. As shown in Figure 15, indicate your eCQM reporting mechanism.

6.1 Indicate whether you can report PCF eCQMs via submission of a QRDA III file by selecting either "QRDA III" or "Unable to report" as appropriate. See item 1 in Figure 15.

6.2 If you select "Unable to report," a list of menu options will be displayed. Select the reason you are not able to report for the current performance year. See item 2 in Figure 15.

Important Note: Practices that fail to report eCQMs by the correction and extension deadline may fail the Quality Gateway and/or be subject to remedial action up to and including termination from the model, as stated in the PCF Participation Agreement.

Figure 15: Health IT Details—eCQM Reporting Mechanisms



Step 7: Add or Update Health IT Requirements Status

In this section you are asked to review your list of vendors and confirm that they are mapped correctly to the health IT requirements you are using them to meet. Next, you are asked to attest to meeting the overall CEHRT requirement. Lastly, you are asked to indicate whether your practice plans to transition, or switch, from your current primary or eCQM reporting vendor to a new vendor.

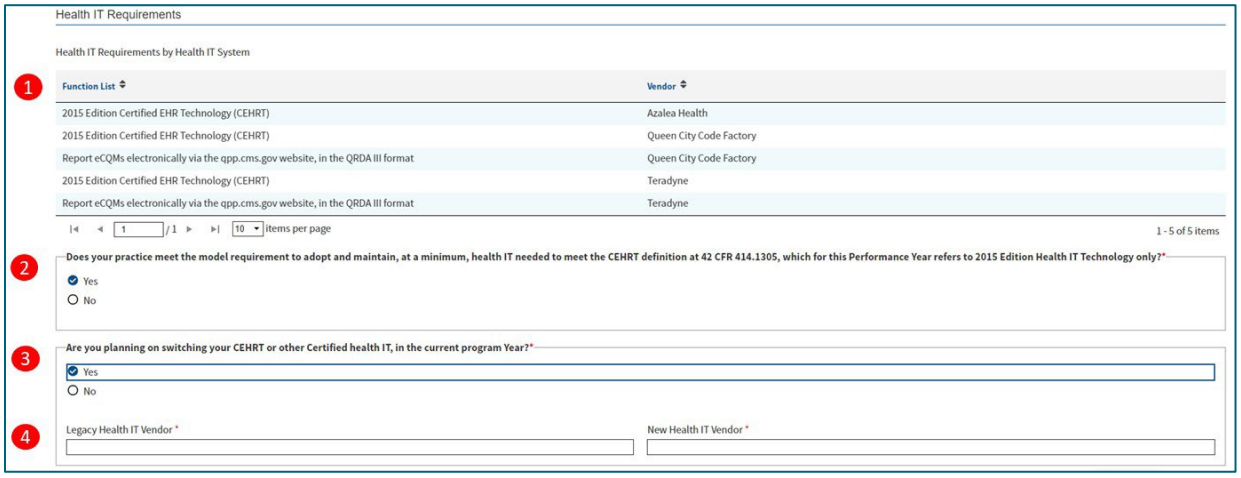
7.1 Review the health IT functions table and ensure the associated health IT vendor has been populated correctly (refer to Step 3: Add or Update Health IT Vendor Information if changes are needed). See item 1 in Figure 16.

7.2 Confirm that your practices use health IT that meets the CEHRT definition by selecting the **Yes** radio button as shown in item 2 in Figure 16.

7.3 Indicate whether your practice has plans to change any of the health IT vendors added to the Vendor Roster during the current performance year by selecting the appropriate radio button as shown in item 3 in Figure 16.

7.4 If you indicate in step 7.3 that you have plans to change health IT vendors, enter the names of the legacy and new health IT vendors in the free text boxes. See item 4 in Figure 16.

Figure 16: Health IT Requirements—Function List, CEHRT Confirmation and Switching Plans



Next, you'll need to attest to meeting PCF's requirements to provide patient access to their electronic health information (EHI) and refrain from information blocking.

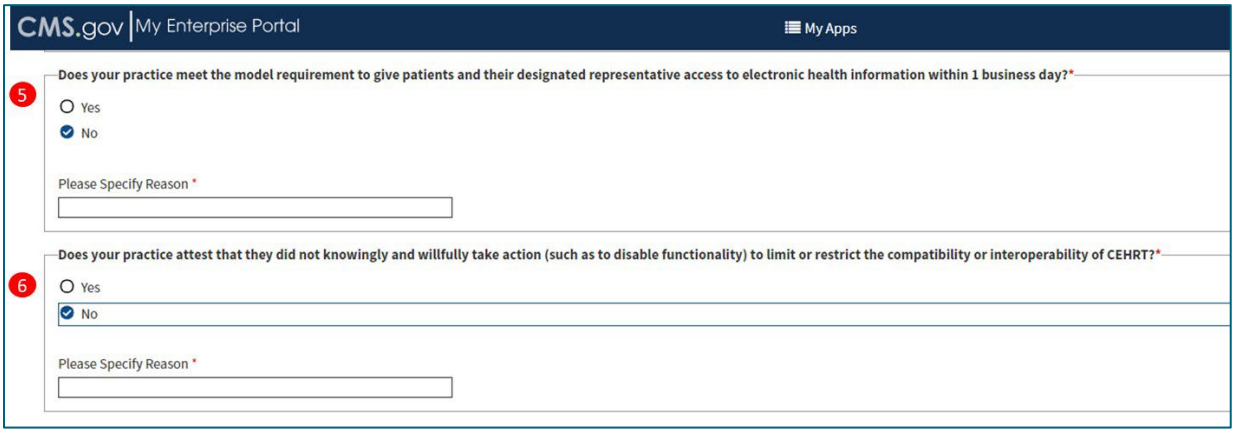
7.5 To indicate whether your practice meets the model requirement to give patients and their designated representative access to EHI within 1 business day of the information being available to the PCF Practice for each patient encounter seen by the PCF clinician, select the appropriate radio button. If your practice currently does not meet this requirement, a text box will appear to allow you to note the reason. See item 5 in Figure 17.

Note: By the start of third performance year, PCF practices must provide patients access to EHI via a standards-based Application Programming Interface (API), which

the 21st Century Cures Act defined HL7® Fast Healthcare Interoperability Resources (FHIR®) Release 4.0.1 as the foundational standard.

7.6 To indicate whether your practice knowingly and willfully takes action to limit or restrict the compatibility or interoperability of CEHRT, select the appropriate radio button. If your practice limits or restricts the compatibility or interoperability of CEHRT, a text box will appear to allow you to record the reason. See item 6 in Figure 17.

Figure 17: Health IT Requirements—Interoperability Requirements, Access to EHI and Information Blocking



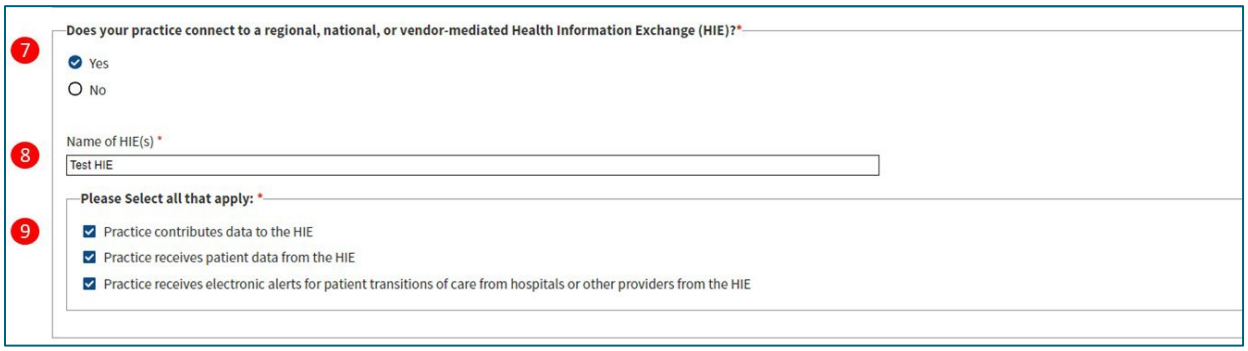
The entries shown in Figures 18 and 19 allow you to indicate whether your practice meets the model requirement to connect to a regional, national, or vendor-mediated health information exchange (HIE).

7.7 To indicate whether your practice connects to a regional, national, or vendor-mediated HIE, select the appropriate radio button. See item 7 in Figure 18.

7.8 If you selected "Yes," record the name of your HIE(s) in the text box. See item 8 in Figure 18.

7.9 Select the check box next to all statements that apply to your connection to HIE. See item 9 in Figure 18.

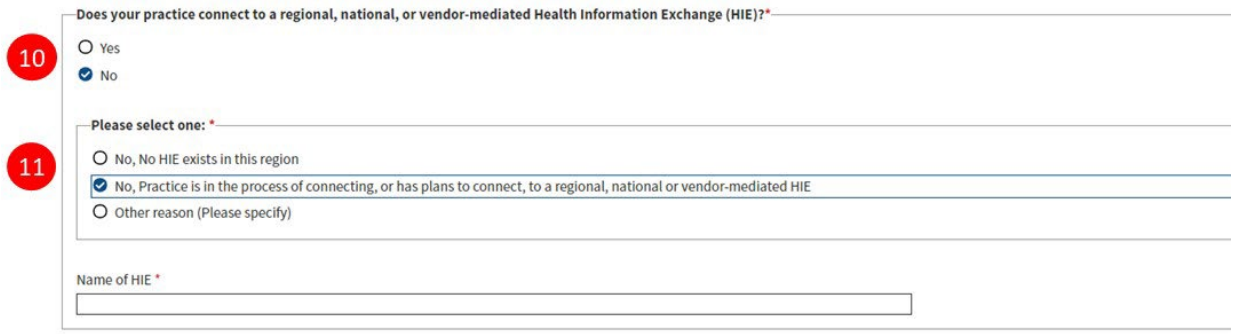
Figure 18: Health IT Requirements—HIE, Part 1



7.10 If you answered “No” to item 7 in Figure 18, please select your practice’s reason for not connecting to an HIE. Selecting “Other reason” will display a text box where you can record your reason (not displayed in Figure 18 or 19). See item 10 in Figure 19.

7.11 If your reason for not being connected to an HIE is that you have started to connect or intend to connect but have not completed the process, select “No, Practice is in the process of connecting, or has plans to connect, to a regional, national, or vendor-mediated HIE”, then type in the name of your planned HIE(s) in the text box that will appear. See item 11 in Figure 19.

Figure 19: Health IT Requirements—HIE, Part 2



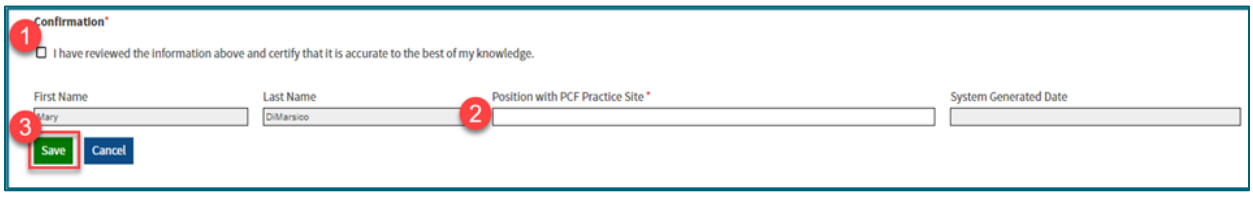
Step 8: Complete the Confirmation Section

8.1 Confirm that the information entered is accurate by checking the box. See item 1 in Figure 20.

8.2 Enter your **Position with PCF Practice Site**. See item 2 in Figure 20.

8.3 To save and publish your results, click the **Save** button. See item 3 in Figure 20.

Figure 20: Health IT Details—Saving Results



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