User Guide for PRIME Registry Sign-Up

Version 1.3

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Sign Up
To Sign Up your practice with the PRIME Registry visit https://Registry.theabfm.org/Signup/Registry.aspx and follow the instructions provided below.

Register New User
Before starting the enrollment process, the user needs to register with the PRIME Registry.

The user can customize the user name.

The password must meet the following minimum requirements:

1. Must be at least eight characters in length.
2. Must contain at least one upper case letter (A through Z)
3. Must contain at least one lower case letter (a through z)
4. Must contain at least one number (0 through 9)
5. Must not be the same as the username

Register New User link will redirect the user to a window for creating a new account.

Clicking on the Next Step button will take the user to the main login page.

Discards entered values and exits the window.
Every Practice will need to provide a PRIME Registry Administrator.

The main login page shown below is where the practice’s PRIME Registry Administrator will provide basic contact information. Mandatory fields are addressed with a red asterisk mark (*) to the right.

- First Name *
- Middle Name (Optional)
- Last Name *
- Phone *
- Email Address *

The user must enter only letters. Numbers and special characters are not allowed.

The phone number must be 10 digits.

The email address must be correct to validate the account in the next stage.

Checking this box will assign the practice’s PRIME Registry Administrator as a clinician as well as the Administrator. The

The Refresh button will replace the CAPTCHA if the current one is unreadable.
After completing the required fields, the user must click the **Create Account** button in order to proceed to the next page - where the below clickable menu outlining the 5 steps to completing your registration are displayed.

1) Practice Information  
2) Clinician & Location  
3) TIN Information  
4) EHR Information  
5) Agreement
Existing User
Displayed below is the main login page. An already existing PRIME Registry user can log in by entering a valid username and password.

PRIME Registry Sign Up/ Sign In

Instructions:
- If you are a new user, click the “Register New User” link.
- If you are an existing PRIME Registry user enter your username and password to login.

[For more information on the sign up/ sign in process, visit this link] or [Review the User Guide]

Existing User
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[For more information on the sign up/ sign in process, visit this link] or [Review the User Guide]
Reset Password

In case a user forgets their password, the **Reset Password** button has been provided to replace the **old** password with a **new** password.

Clicking on **Reset Password** button will direct the user to a new window. In this window, user must enter the email address registered with **PRIME Registry** at the time of Sign Up in order to receive the password link.

Forgot your account's password? Enter your registered email address and we'll send you a recovery link.

**Registered Email Address:**

A link will be provided within the email sent from PRIME Registry. The user can click on the link for validation of account and the system will ask for the reset password.
**Practice Information**

Step 1 captures the demographic information related to the Practice:

- Name *
- Address 1 *
- City *
- State *
- Zip *

By default the practice PRIME Registry Administrator contact information will be displayed in the table.

---

**Practice Admin Contact**

<table>
<thead>
<tr>
<th>FIRST NAME</th>
<th>MIDDLE NAME</th>
<th>LAST NAME</th>
<th>PHONE</th>
<th>EMAIL ADDRESS</th>
<th>LOGIN NAME</th>
<th>DEPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST</td>
<td>TEST</td>
<td></td>
<td>859-555-1234</td>
<td><a href="mailto:test@testing.com">test@testing.com</a></td>
<td>TESThajjar</td>
<td></td>
</tr>
</tbody>
</table>

Total Records: 1

- Sorts columns in ascending or descending order.
- Search based on individual column.
- The Bin icon will delete the selected practice record from the list.
- Allows user to add multiple practice admin contacts.
Add Practice Admin Contact.

To add a new practice admin contact, details required to be provided are First Name, Last Name, Phone number (10 digit), Email Address, and Login Name.

The Window will be extended further after checking the box for “Check this box if also a Clinician” to add clinician details like:

- Individual Clinician NPI*
- ABFM ID (Six digits)
- Date of Birth
- Specialty *
- Designation*

Specialty can be described in multiple values like Family Medicine, Pediatrics, Internal Medicine, Obstetrics and Gynecology. The user can choose the options as per requirement.

Clicking the **Save** button and then the **Next** button will bring you to Step 2 – Clinician & Location.
Clinician and Location

Clinician
This Step helps the user to fill in the information about clinicians(s) and location(s) associated with the practice. Minimum of one clinician needs to be entered to proceed to Step 3 – TIN Information.

Add New Clinician
The user can add clinician details by filling the data for:

- First Name *
- Middle Name (Optional)
- Last Name *
- Date of Birth
- Individual Clinician NPI*
- ABFM ID
- Email *
- Specialty *
- Designation*

Add new record to the clinician table.

Allows the user to create a new clinician.

Discards entered values and exits the window.
Location
This tab captures information related to the Location associated with the practice.

Add New Location
Following Location details need to be entered

- Location Name *
- Address *
- State/Province *
- City/Town *
- Zip Code *

Clicking the **Save** button and then the **Next** button will bring you to Step 3 - TIN Information.
TIN Information

This Step adds the TIN Information for the particular practice.

A practice may add an additional TIN to their PRIME Registry account by clicking the **Add New Practice TIN** button.

**Please note – if you have more than one TIN for a single practice – the validity dates of each TIN should not overlap.**

Example: in the table below, Practice TIN 181818181 is valid from 02-01-2016 to 02-29-2016. If an additional TIN is added for this Practice (TIN 282828282 for sake of example) the “valid from” and “valid to” dates for this new TIN cannot fall between the 02-01-2016 to 02-29-2016 date range. An accurate date range example would be: valid from 03-01-2016 to 12-31-2016.

<table>
<thead>
<tr>
<th>TIN</th>
<th>Valid From</th>
<th>Valid To</th>
<th>DELETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>181818181</td>
<td>02-01-2016</td>
<td>02-29-2016</td>
<td></td>
</tr>
</tbody>
</table>

Total Records : 1

Add New Practice TIN

Following TIN details need to be entered

- TIN *
- Valid From *
- Valid To (Optional)

Clicking the **Save** button and then the **Next** button will bring you to Step 4 - EHR Information.
**EHR Information**

The 4th Step is a series of questions related to practice technology currently in place. It is designed to help understand and capture the information technology environment to help FIGmd work efficiently with your resources.

It is important that the user fills in the information as accurately as possible.

The questionnaire is divided into 3 different categories:

**Contact Information**

- **Practice IT Contact Name:**
- **Practice IT Contact Email:**
- **Practice IT Contact Phone Number:**

**Electronic Health Record (EHR) Information**

- **Name of EHR System:**
- **Version of EHR System:**
- **Is your EHR a complete 2014 Certified EHR Technology (CEHRT)?**
- **EHR Hosting:**
- **Relational Database Management System used by EHR:**

- **Select:**
  - ASP Model Hosted By EHR Company
  - ASP Model Hosted By Outside Vendor
  - In Practice Network Managed By EHR Company
  - In Practice Network Managed By Outside Vendor
  - In Practice Network Managed By Practice

- **Oracle Version**
- **PostgreSQL Version**
- **MySQL Version**
- **Other**
- **Unknown**
# Practice Management (PM) System Information

**C. Practice Management (PM) System Information**

<table>
<thead>
<tr>
<th>Name of PM System</th>
<th>Version of PM System</th>
</tr>
</thead>
</table>

Only after answering all the mandatory questions and clicking the **Next** button can the user proceed to the 5th and final Step – Agreement.
**Agreement**

In order to complete the sign-up process, the user must sign agreements with both FIGmd and the PRIME Registry. FIGmd requires the signing of three (3) agreements that are combined into one (1) document. The three (3) FIGmd agreements are: Data Warehousing Agreement, Business Associate Agreement, and Data Release Consent. PRIME Registry requires the signing of three (3) additional agreements that are combined into one (1) document. The three (3) PRIME Registry agreements are: Registry Participation Agreement, Business Associate Agreement, and Data Release Consent.

The user can sign the documents electronically during registration process or can select the other option to send the documents to the registered email address to sign later. **Reminder – PRIME Registry is not complete until both the PRIME Registry and FIGmd agreements are signed.**

For those users wanting to complete the sign-up process right away, Echo-sign capability has been provided to securely sign the documents electronically.

Selecting **“E-Sign the agreements NOW”** will open the document PDF for easy electronic agreement signing and Registry sign-up completion.

Selecting **“E-Sign the agreements LATER”** will automatically send the document link to the registered email address for user review and electronic signature at a future time.

If this option is selected – your PRIME Registry sign-up remains incomplete until the signed FIGmd agreement & PRIME Registry agreement are received.

The FIGmd Agreement will be a data warehousing agreement and will be between FIGMD and the practice.

The PRIME Registry Agreement will be between American Board of Family Medicine and the practice and will be named Master Registry Agreement.
E-Sign Agreements Now
Choosing this option allows the user to complete the PRIME Registry Sign Up process right away by signing the agreements within the online registration portal.

Clicking on “Sign FIGmd Agreement” button will extend the window to populate the PDF file of the agreements. It will also add a row to the table below with the Signing Option as “Sign through Portal” and Status “Not Signed”.

The yellow pointer will guide the user to the particular area within the document where the next needed signature is located.

The blue box on the top will indicate the number of signatures required. The total count should be 3.
The FIGmd PDF contains three (3) agreements that are combined into one (1) document. The three (3) agreements are: Data Warehousing Agreement, Business Associate Agreement, and Data Release Consent. Each of the agreements will require a signature. For ease of use, once the user signs the 1st signature, the signature will be stored in temporary data allowing the user to only click on the remaining two signature holding places to copy the same signature.

Clicking the “Click to sign” button will bring you to the FIGmd Agreement confirmation window, where you can download a copy of the agreement for your files. An email will be sent to you once all signers have signed the agreement.
Next, the user will follow the same procedure to “E-sign the PRIME Registry Agreement now.” The PRIME Registry PDF contains three (3) agreements that are combined into one (1) document. The three (3) agreements are: Registry Participation Agreement, Business Associate Agreement, and Data Release Consent. Each of these agreements will require a signature.

**Reminder – PRIME Registry is not complete until both the PRIME Registry and FIGmd agreements are signed.**

Step 1: User electronically signs the PRIME Registry agreements by choosing “E-sign the agreements NOW to complete Registry sign-up.”

Step 2: Clicking on “Sign PRIME Registry Agreement” button will extend the window to populate the PDF file of the agreements. User signs the 1st signature, the signature will be stored in temporary data allowing the user to only click on the remaining two signature holding places to copy the same signature.

**Sign Agreements**

Name:*  
Title:*  
Please enter your email address:*  
Please re-enter your email address:*  

- **E-sign the agreements NOW to complete Registry sign-up**
- **E-sign the agreements LATER to have document link emailed to you**  
  (Registry sign-up completed at later date)

Sign FIGMD Agreement  Sign PRIME Agreement
As contemplated by the Data Warehousing Agreement between the “Practice” identified above and FIGMD, Inc. (“FIGMD”), the Practice hereby authorizes and instructs FIGMD to disclose the data described in general terms above to the “Recipient” identified above and its designee(s). Practice has determined, and hereby represents, that any disclosure of such data made in accordance with this Data Release Consent is permitted under applicable laws (including, without limitation, HIPAA) and Practice has obtained any authorizations or consents from patients or other third parties required for such disclosure. Practice acknowledges and agrees that this Data Release Consent neither amends nor waives any term or condition of such Data Warehousing Agreement.

Signature: 
Email: demossrs@gmail.com
Name: Test Practice
Title: Practice Director

Acknowledged: FIGMD, INC.

Signature: 
Email: siddhik@figmd.com
Name: Siddhi Baralay
Title: COO

Click to sign will appear at the bottom of page once all 3 signatures are done. Clicking on it will complete the signing procedure.

Step 3: Clicking the “Click to sign” button will bring you to the PRIME Registry Agreement confirmation window, where you can download a copy of the agreement for your files. An email will be sent to you once all signers have signed the agreement.
E-Sign Agreements Later
Choosing this option will give the user the ability to sign the agreement as per the need at a later stage. The system will send an email containing links of the agreements to the registered email address. The signing procedure will be the same as described above.

The completion of the signing process will be indicated by the pop up message as displayed below.

![Congratulations message](image)

Congratulations - The PRIME Registry Sign-Up process is now complete.