

Connect to an Organization and Select a Role

[Updated 04/26/2022](#)

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Attention Representatives of Medicare Shared Savings Program (Shared Savings Program) Accountable Care Organizations (ACOs):

Shared Savings Program ACOs have a different Health Care Quality Information System (HCQIS) Access Roles and Profile system (HARP) account creation and Quality Payment Program (QPP) role management process. ACOs will no longer be able to perform these actions on qpp.cms.gov.

If your organization is a Shared Savings Program ACO, please **DO NOT** follow the information in this document. Instead, please refer to the **Medicare Shared Savings Program ACOs: Creating and Managing a HARP Account with a QPP Role in ACO-MS document (PDF)** in the [QPP Account Access Guide](#) (ZIP file) for information on how to obtain a HARP account with a QPP Security Official or Staff User role and manage your role in the [ACO Management System \(ACO-MS\)](#). If you are your ACO's QPP Security Official or Staff User contact in ACO-MS, then you can sign in to qpp.cms.gov using your ACO-MS Username and Password.

Please note that the ACO-MS process only applies to representatives of a Shared Savings Program ACO, and not to the Participant TINs in the ACO. Representatives of a Participant TIN will still need to create an account on harp.cms.gov and request and manage their QPP role on qpp.cms.gov, using the information in this resource.

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Introduction

This document outlines the steps with screenshots to Connect to an Organization (like a practice, QCDR/Registry, or APM Entity) and how to get the Security Official or Staff User role you need on qpp.cms.gov.

The role you select for each organization will allow you to:

- View information (like performance feedback), or
- Perform an action (like submitting performance data or completing an opt-in election).

If you are a new HARP user or an existing user requesting access to an organization, you'll need to understand which organization type to select and know which role you need.

Don't need step-by-step instructions with screenshots?

Check out the **QPP Access At-a-Glance** document in the [QPP Access User Guide](#) (ZIP file).

Have questions? Contact the Quality Payment Program
By Phone: 1-866-288-8292 (Customers who are hearing impaired can dial 711 to be connected to a TRS Communications Assistant) or By Email: QPP@cms.hhs.gov
Monday – Friday, 8 a.m. – 8 p.m. ET

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Getting Started

Sign In to qpp.cms.gov

Go to qpp.cms.gov and click Sign In on the upper right-hand corner.

- Enter your User ID and Password.
- Check **Yes, I agree** next to the Statement of Truth and click Sign In.

Then, you will be prompted to provide a **security code** from your two-factor authentication.

Home /

QPP Account

Sign in Register

Sign in to QPP

USER ID
User ID

PASSWORD
Password

Show password

Forgot your user id or password? [Recover ID or reset password](#)

If you are a representative of a Shared Savings Program ACO and can access the ACO Management System (ACO-MS), then you can sign in to QPP using the same User ID and Password.

STATEMENT OF TRUTH

In order to sign in, you must agree to this: I certify to the best of my knowledge that all of the information that will be submitted will be true, accurate, and complete. If I become aware that any submitted information is not true, accurate, and complete, I will correct such information promptly. I understand that the knowing omission, misrepresentation, or falsification of any submitted information may be punished by criminal, civil, or administrative penalties, including fines, civil damages, and/or imprisonment.

Yes, I agree

Sign in > Don't have an account? [Register](#)

Returning users:

Sign in with the same credentials you've previously used.

New users:

Sign in with your newly created HARP credentials.

Don't have an account?

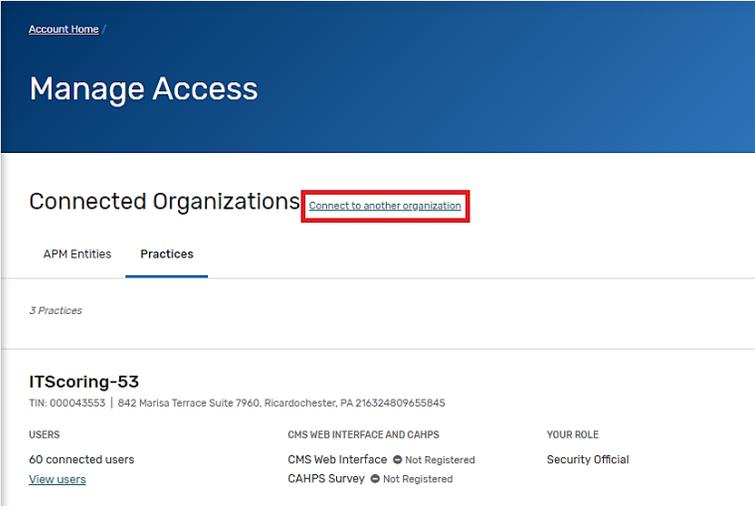
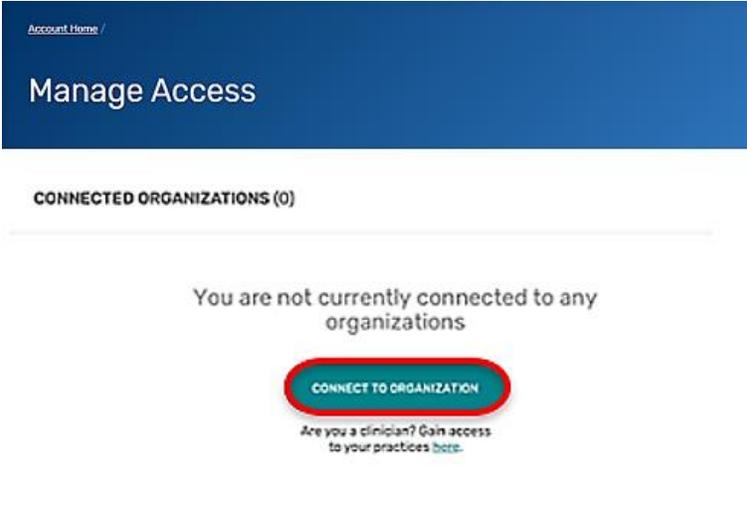
Click [Register](#) next to Sign In and review the **Register for a HARP Account document** in this [guide](#).

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Navigate to Manage Access

Click Manage Access on the left-hand navigation pane.

| Returning Users | New Users | | | | | | |
|---|---|-----------------------------|-----------|--|---|-------------------|--|
|  <p>Account Home /</p> <h3>Manage Access</h3> <p>Connected Organizations Connect to another organization</p> <p>APM Entities Practices</p> <p>3 Practices</p> <p>ITScoring-53 TIN: 000043553 842 Marisa Terrace Suite 7960, Ricardochester, PA 216324809655845</p> <table><thead><tr><th>USERS</th><th>CMS WEB INTERFACE AND CAHPS</th><th>YOUR ROLE</th></tr></thead><tbody><tr><td>60 connected users View users</td><td>CMS Web Interface ● Not Registered CAHPS Survey ● Not Registered</td><td>Security Official</td></tr></tbody></table> | USERS | CMS WEB INTERFACE AND CAHPS | YOUR ROLE | 60 connected users View users | CMS Web Interface ● Not Registered CAHPS Survey ● Not Registered | Security Official |  <p>Account Home /</p> <h3>Manage Access</h3> <p>CONNECTED ORGANIZATIONS (0)</p> <p>You are not currently connected to any organizations</p> <p>CONNECT TO ORGANIZATION</p> <p>Are you a clinician? Gain access to your practices here.</p> |
| USERS | CMS WEB INTERFACE AND CAHPS | YOUR ROLE | | | | | |
| 60 connected users View users | CMS Web Interface ● Not Registered CAHPS Survey ● Not Registered | Security Official | | | | | |
| <p>You will see a list of organizations that you're currently connected to and have the option to connect to another organization.</p> <p>Helpful Hint: Review and confirm that the list of connected organizations and roles are correct. If correct, no further action is required.</p> | <p>You will be prompted to connect to an organization.</p> | | | | | | |

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Connect to an Organization Step-by-Step Instructions

Overview

Now that you have successfully signed in to qpp.cms.gov and navigated to **Manage Access**, follow these steps to **Connect to an Organization**:

1. Select connect to an organization
2. Choose your organization type
3. Find your organization
4. Select your role

Then you can review your confirmed role requests (pending or automatic approved).

Reminder: There's a special role available to clinicians.

Check out the Connect as a Clinician document in this [guide](#) for more information.

Important Notes:

- Each organization must have at least one individual with the Security Official role before anyone can request a Staff User role or additional Security Official roles.
- Contact an administrator in your organization to let them know your organization needs a Security Official if that's not an appropriate role for you.

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Step 1: Select Organization Type

Select the **organization type** you'd like to connect to and click continue.

The organization types are:

- Practice
- Individual Clinician (refer to the Connect as a Clinician document in this [guide](#))
- Alternative Payment Model (APM) Entity
- Registry (includes Qualified Registries and Qualified Clinical Data Registries (QCDRs))
- Virtual Group

Note: If you are connecting to multiple organizations, you will need to complete a request for **each** organization type, one at a time.

Looking for more information on Organization Types?

More information on selecting an organization type is available in [Appendix A](#).

Step 1 of 3

Select Organization Type

Practice

A representative of a single TIN can request a practice role. The first Security Official will need to provide the PTAN and NPI of a single clinician that is part of that practice.

Individual Clinician

A clinician (not a representative or third party) with NPI, SSN and PTAN information for one participating practice (TIN) can request an individual clinician role. With this role, clinicians can review their performance feedback for all their associated practices, virtual groups and APM entities that participated in MIPS. Clinicians cannot manage additional users or view data for any other clinicians.

Alternative Payment Model (APM) Entity

A representative of entities participating in Shared Savings Program, Next Generation, CPC+, CEC, OCM, Maryland Total Cost of Care, BPCI Advanced, Vermont All-payer, CJR, Primary Care First (PCF), Direct Contracting (DC), and Independence at Home Demonstration can request an APM entity role. The first Security Official may need to provide different data based on model.

If you are a representative of a Shared Savings Program (SSP) ACO, you must contact your ACO to get a QPP Security Official or Staff User role via the [ACO Management System \(ACO-MS\)](#).

Registry

A representative of a CMS-approved registry can request a registry role. The first Security Official will need to provide the Vendor ID for the registry.

Virtual Group

A representative of a CMS-approved virtual group can request a virtual group role. The first Security Official will need to provide the TINs of 2 participating practices.

CONTINUE

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Step 2: Find Your Organization Type

Use the search criteria to **find your organization** using search criteria. The search criteria are dependent upon your organization type.

Review the table below to determine what search criteria you can use to find your organization. Then, **click your organization type for step-by-step instructions** on how to find your organization type.

| Organization Type | Criteria you can use to search |
|--|--|
| Practice | <ul style="list-style-type: none">• Legal Business Name; OR• Complete TIN without dashes<ul style="list-style-type: none">○ No search results will populate until you enter the complete TIN (9 digits) |
| APM Entity | <p>Step 1: Identify your APM</p> <p>Step 2: Provide:</p> <ul style="list-style-type: none">• Legal Business Name (APM Entity Name)• APM Entity ID (e.g., ACO ID or Practice Site ID for some models like CPC+ and OCM) |
| Registry (Qualified Registries and QCDRs) | <ul style="list-style-type: none">• Legal Business Name; OR• Vendor ID; OR• Complete TIN<ul style="list-style-type: none">○ No search results will populate until you enter the complete TIN (9 digits, without dashes) |
| Virtual Group | <ul style="list-style-type: none">• Complete Virtual Group ID |

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Practice

| Action | Description | Image |
|-------------------------|---|-------|
| Connecting to Practices | <p>Identify how many practices you want to connect to.</p> <ul style="list-style-type: none"> You can connect to as many as 25 practices at one time. | |
| Search for Practice | <p>Search for the practice(s) by TIN or legal business name.</p> <p>If you are searching by:</p> <ul style="list-style-type: none"> Legal business name: start typing and select the practice from the suggested matches. TIN: enter the complete TIN (without dashes). <p>If you need to connect to another practice, select add another practice. If no longer need to connect to a given practice, select remove.</p> | |
| Select Practice | <p>Select the practice from the drop down and click continue.</p> | |

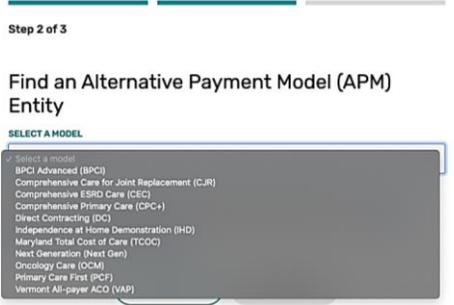
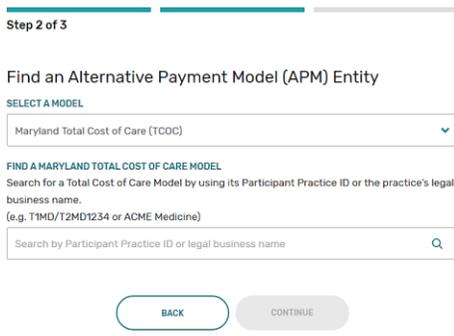
Ready to Select a Role?

Click here for [Step 3: Select a Role](#)

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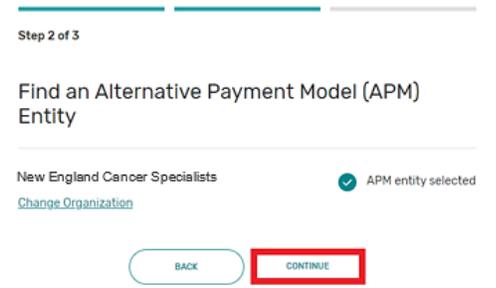
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APM Entity

| Action | Description | Image |
|------------------------------|--|--|
| <p>Select a Model</p> | <p>Select the APM you need to connect to from the drop-down menu: Once the APM is selected, click continue.</p> |  |
| <p>Search for APM Entity</p> | <p>Search for the APM Entity, input fields will vary based on APM selected.</p> |  |

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| Action | Description | Image |
|--|--|--|
| Review Selection or Change Selected APM Entity | Review and confirm that you selected the correct organization, then click continue . OR Click change organization to update your APM Entity if you selected the incorrect option. |  |

Ready to Select a Role?
Click here for [Step 3: Select a Role](#)

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Registry

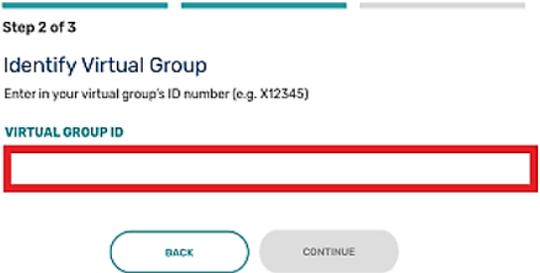
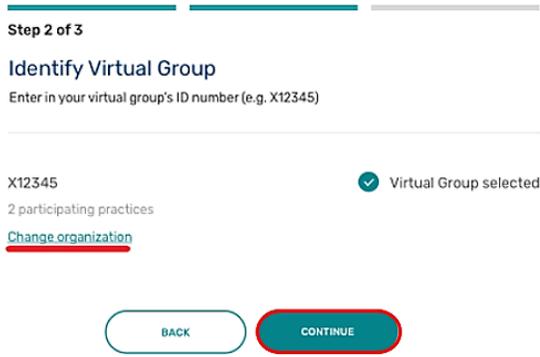
| Action | Description | Image |
|--|---|-------|
| Search for Registry | <p>Search for the registry (Qualified Registries and QCDRs) via TIN, Registry name, or Registry ID.</p> <p>If you are searching by:</p> <ul style="list-style-type: none"> • Legal business name: start typing the registry's name and a list of suggested matches will populate based on what you've entered so far. • TIN: you will need to enter the registry's complete TIN (9 digits, without dashes) before a match is identified. • Vendor ID: you will need to enter the registry's complete Vendor ID (e.g., 45-2343) before a match is identified. | |
| Select Registry | <p>Select the Registry from the drop down and click continue.</p> | |
| Review Selection or Change Selected Registry | <p>Review and confirm you selected the correct organization, then click continue.</p> <p>OR</p> <p>Click the change organization link to update your registry if you selected the incorrect option.</p> | |

Ready to Select a Role?
Click here for [Step 3: Select a Role](#)

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Virtual Group

| Action | Description | Image |
|---|--|--|
| Search for a Virtual Group | Search for the Virtual Group by entering your complete Virtual Group ID , then click continue . |  <p>Note: If you enter an incorrect Virtual Group ID, you will receive a message noting that your Virtual Group ID is invalid below the entry field. Confirm you entered the correct Virtual Group ID if you encounter this message.</p>  |
| Review Selection or Change Selected Virtual Group | Confirm that the correct virtual group was selected and click continue . OR Click change organization to update your virtual group if you selected the incorrect option. |  |

Ready to Select a Role?
Click here for [Step 3: Select a Role](#)

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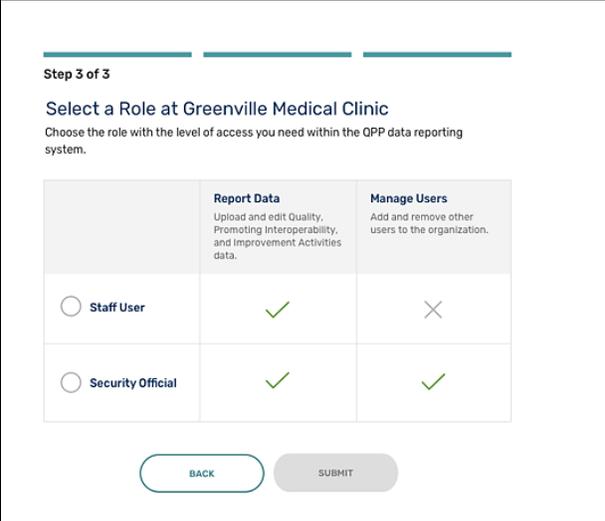
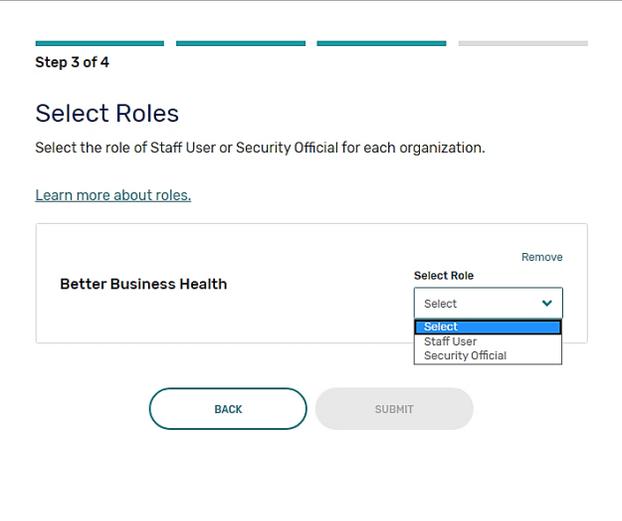
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Step 3: Select a Role

For all organization types, you have two roles to select from:

1. The [Staff User](#) role
2. The Security Official role ([first Security Official](#) or [additional Security Official\(s\)](#))
 - Each organization type must have **at least one individual with the Security Official role** before anyone can request a Staff User role or additional Security Official roles.
 - The **first Security Official** will provide **additional information** during the validation process. The additional information requested will vary depending on organization type.

Note: Practices have a different role selection experience, in which they are prompted to select a role from a drop down menu.

| APM Entities, Virtual Groups, Registries | Practices |
|--|---|
| Select the appropriate role from table | Select the appropriate role from drop down menu |
|  |  |

Looking for more information on these roles?
 More information on the two QPP roles, and what each role lets you do, is available in [Appendix B](#) and [Appendix C](#).

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First Security Official

If you are the **first** person to connect to your organization, select **Security Official**.

You will be prompted to enter [additional information](#) for **validation** and click **Submit**. Then, you will be [automatically approved](#) if your validation is successful.

Account Dashboard > Manage Access

Connect to Organization

Step 3 of 3

Select a Role at Greenville Medical Clinic

Choose the role with the level of access you need within the QPP data reporting system.

| | Report Data Upload and edit Quality, Promoting Interoperability, and Improvement Activities data. | Manage Users Add and remove other users to the organization. |
|--|--|---|
| <input type="radio"/> Staff User | ✓ | ✗ |
| <input checked="" type="radio"/> Security Official | ✓ | ✓ |

You chose: **Security Official**

There is currently no Security Official at this practice to approve roles. Therefore, the only role you can obtain at this time is a Security Official role. Request this role or wait for another Security Official to gain access.

In order to be authorized as the first Security Official at this practice, enter the practice TIN, an NPI for a clinician associated with this practice and that clinician's PTAN. [What's a PTAN?](#)

PRACTICE TIN
9-digits e.g. 123456789

CLINICIAN NPI
10-digits e.g. 1234567890

CLINICIAN PTAN
10-digits e.g. 1234567890

BACK SUBMIT

Remember: Each organization must have a **Security Official** before anyone can request a Staff User role or additional Security Official roles.

If Security Official is **not** the appropriate role for you, contact an administrator in your organization to let them know your organization needs a Security Official.

You must provide all the requested information to complete your role request.

If you receive an **error message**, there's detailed information available in [Appendix D](#).

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Additional Information Required for Validation of the Security Official Role

If you apply for the first Security Official role at your organization, you'll need to provide some **additional information** to validate your credentials.

Note: The additional information is dependent upon your organization type.

| Organization Type | Required Information | Additional Context |
|--|--|---|
| Practice | <ul style="list-style-type: none"> ✓ The practice's TIN ✓ The NPI of one clinician in the practice <ul style="list-style-type: none"> ○ That clinician's Provider Transaction Access Number (PTAN) | <p>Follow these steps to find PTANs in PECOS:</p> <ol style="list-style-type: none"> 1. Log in to internet-based PECOS. 2. Select My Associates on PECOS home page. 3. Select View Enrollments by applicable individual or organizational enrollment. 4. Click on View Medicare ID Report 5. PTAN(s) are listed in Medicare ID column. |
| APM Entity – Bundled Payments for Care Improvement (BPCI) Advanced | <ul style="list-style-type: none"> ✓ The participant practice's ID ✓ Two participant TINs | Security Officials for a single TIN ACO only need to provide one TIN |
| APM Entity – Comprehensive ESRD Care Model (CEC) | <ul style="list-style-type: none"> ✓ The APM Entity ID (your ESRD Seamless Care Organization ID) ✓ The TIN of a practice associated with the Organization Site ✓ The NPI of a clinician in the practice associated with the Organization Site | If your ESCO includes multiple TINs, you can enter any of these TINs and an NPI associated with the ESCO in that TIN |
| APM Entity – Comprehensive | <ul style="list-style-type: none"> ✓ CJR Participant ID | If your Practice Site includes multiple TINs, you can enter any of these TINs |

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| Organization Type | Required Information | Additional Context |
|--|--|--|
| Care for Joint Replacement (CJR) | <ul style="list-style-type: none"> ✓ Participant TIN/NPI combination | and an NPI associated with the Practice Site in that TIN |
| APM Entity – Comprehensive Primary Care Plus (CPC+) | <ul style="list-style-type: none"> ✓ The APM Entity ID (your Practice Site ID) ✓ The TIN of a practice associated with the Practice Site ✓ The NPI of a clinician in the practice associated with the Practice Site | If your Practice Site includes multiple TINs, you can enter any of these TINs and an NPI associated with the Practice Site in that TIN |
| APM Entity – Global Professional Direct Contracting (GPDC) | <ul style="list-style-type: none"> ✓ The APM Entity ID (your ACO ID) ✓ The TINs of two practices participating in the ACO | Security Officials for a single TIN APM only need to provide one TIN |
| APM Entity – Independence at Home Demonstration | <ul style="list-style-type: none"> ✓ The practice’s ID ✓ Two participant TINs | Security Officials for a single TIN APM only need to provide one TIN |
| APM Entity – Maryland Total Cost of Care (TCOC) | <ul style="list-style-type: none"> ✓ The practice’s ID ✓ Two participant TINs | Security Officials for a single TIN APM only need to provide one TIN |
| APM Entity – Next Generation ACO | <ul style="list-style-type: none"> ✓ The APM Entity ID (your ACO ID) ✓ The TINs of two practices participating in the ACO | Security Officials for a single TIN ACO only need to provide one TIN |
| APM Entity – Oncology Care Model (OCM) | <ul style="list-style-type: none"> ✓ The APM Entity ID (your OCM ID) ✓ The TIN of a practice associated with the Organization Site ✓ The NPI of a clinician in the practice associated with the Organization Site | If your Practice Site includes multiple TINs, you can enter any of these TINs and an NPI associated with the Practice Site in that TIN |

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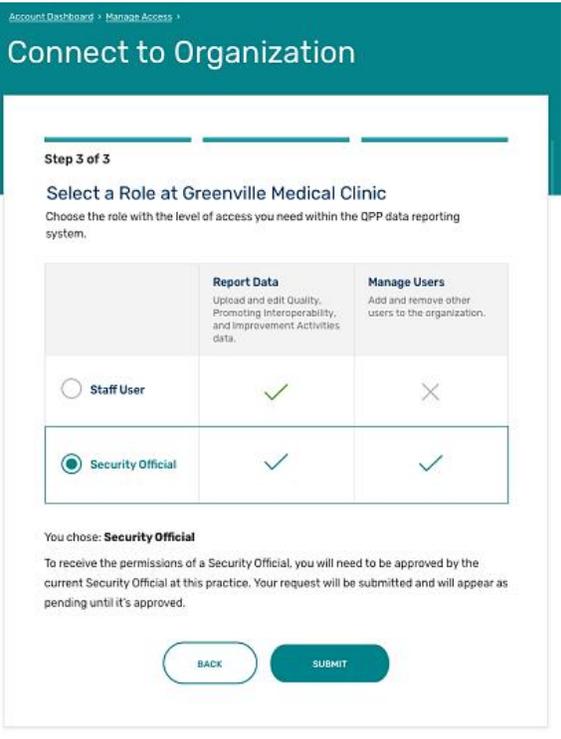
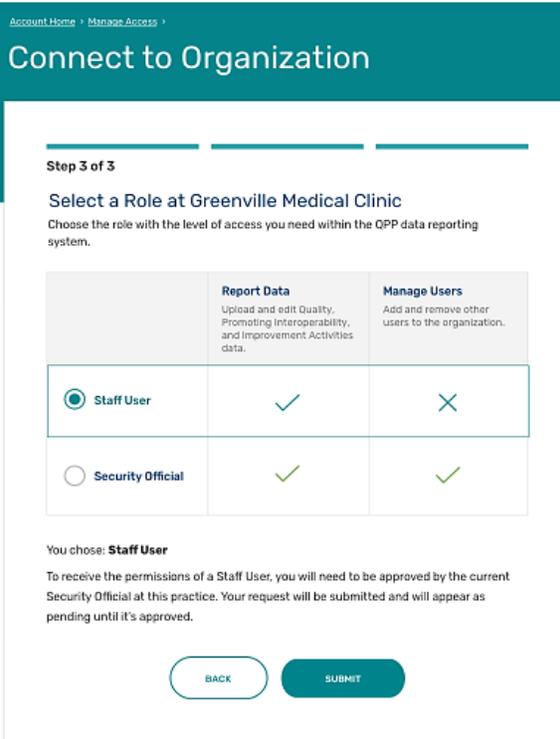
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| Organization Type | Required Information | Additional Context |
|---|---|---|
| APM Entity – Primary Care First (PCF) | <ul style="list-style-type: none"> ✓ PCF Practice ID ✓ Participant TIN/NPI combination | If your Practice Site includes multiple TINs, you can enter any of these TINs and an NPI associated with the Practice Site in that TIN |
| APM Entity – Value in Treatment (ViT) | <ul style="list-style-type: none"> ✓ ViT Participant ID ✓ Participant TIN/NPI combination | If your Practice Site includes multiple TINs, you can enter any of these TINs and an NPI associated with the Practice Site in that TIN (available after the 3 rd eligibility snapshot released in December or January) |
| APM Entity – Vermont All-payer ACO | <ul style="list-style-type: none"> ✓ The ACO ID ✓ Two participant TINs | Security Officials for a single TIN ACO only need to provide one TIN |
| Registry (Including Qualified Registries and QCDRs) | <ul style="list-style-type: none"> ✓ The TIN of the registry or QCDR ✓ The Vendor ID | <p>We issued your Vendor ID when your self-nomination was approved</p> <p>Note: You can only connect to a Registry organization that has already been approved by us. You don't need to connect to a Registry organization to complete self-nomination for a new entity (i.e., the entity was not approved for a previous performance period).</p> |
| Virtual Group | <ul style="list-style-type: none"> ✓ The TIN of two practices participating in the virtual group | |

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Additional Security Officials and Staff Users

| Additional Security Official | Staff User | | | | | | | | | | | | | | | | | | |
|---|--|--|---|----------------------------------|---|---|--|---|---|---|--|--|---|---|---|---|---|---|---|
| <p>If there is already a Security Official at your organization, select Security Official and click Submit. You will not be prompted to provide additional information.</p> | <p>If you are a Staff User, select Staff User and click Submit. You will not be prompted to provide additional information.</p> | | | | | | | | | | | | | | | | | | |
|  <p>Account Dashboard > Manage Access ></p> <h3>Connect to Organization</h3> <p>Step 3 of 3</p> <p>Select a Role at Greenville Medical Clinic</p> <p>Choose the role with the level of access you need within the QPP data reporting system.</p> <table border="1"> <thead> <tr> <th></th> <th>Report Data Upload and edit Quality, Promoting Interoperability, and Improvement Activities data.</th> <th>Manage Users Add and remove other users to the organization.</th> </tr> </thead> <tbody> <tr> <td><input type="radio"/> Staff User</td> <td>✓</td> <td>✗</td> </tr> <tr> <td><input checked="" type="radio"/> Security Official</td> <td>✓</td> <td>✓</td> </tr> </tbody> </table> <p>You chose: Security Official</p> <p>To receive the permissions of a Security Official, you will need to be approved by the current Security Official at this practice. Your request will be submitted and will appear as pending until it's approved.</p> <p><input type="button" value="BACK"/> <input type="button" value="SUBMIT"/></p> | | Report Data Upload and edit Quality, Promoting Interoperability, and Improvement Activities data. | Manage Users Add and remove other users to the organization. | <input type="radio"/> Staff User | ✓ | ✗ | <input checked="" type="radio"/> Security Official | ✓ | ✓ |  <p>Account Home > Manage Access ></p> <h3>Connect to Organization</h3> <p>Step 3 of 3</p> <p>Select a Role at Greenville Medical Clinic</p> <p>Choose the role with the level of access you need within the QPP data reporting system.</p> <table border="1"> <thead> <tr> <th></th> <th>Report Data Upload and edit Quality, Promoting Interoperability, and Improvement Activities data.</th> <th>Manage Users Add and remove other users to the organization.</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/> Staff User</td> <td>✓</td> <td>✗</td> </tr> <tr> <td><input type="radio"/> Security Official</td> <td>✓</td> <td>✓</td> </tr> </tbody> </table> <p>You chose: Staff User</p> <p>To receive the permissions of a Staff User, you will need to be approved by the current Security Official at this practice. Your request will be submitted and will appear as pending until it's approved.</p> <p><input type="button" value="BACK"/> <input type="button" value="SUBMIT"/></p> | | Report Data Upload and edit Quality, Promoting Interoperability, and Improvement Activities data. | Manage Users Add and remove other users to the organization. | <input checked="" type="radio"/> Staff User | ✓ | ✗ | <input type="radio"/> Security Official | ✓ | ✓ |
| | Report Data Upload and edit Quality, Promoting Interoperability, and Improvement Activities data. | Manage Users Add and remove other users to the organization. | | | | | | | | | | | | | | | | | |
| <input type="radio"/> Staff User | ✓ | ✗ | | | | | | | | | | | | | | | | | |
| <input checked="" type="radio"/> Security Official | ✓ | ✓ | | | | | | | | | | | | | | | | | |
| | Report Data Upload and edit Quality, Promoting Interoperability, and Improvement Activities data. | Manage Users Add and remove other users to the organization. | | | | | | | | | | | | | | | | | |
| <input checked="" type="radio"/> Staff User | ✓ | ✗ | | | | | | | | | | | | | | | | | |
| <input type="radio"/> Security Official | ✓ | ✓ | | | | | | | | | | | | | | | | | |
| What's Next? | | | | | | | | | | | | | | | | | | | |
| <p>Your Security Official role request is currently pending approval.</p> | <p>Your Staff User role request is currently pending approval.</p> | | | | | | | | | | | | | | | | | | |

Have questions? Contact the Quality Payment Program
 By Phone: 1-866-288-8292 (Customers who are hearing impaired can dial 711 to be connected to a TRS Communications Assistant) or By Email: QPP@cms.hhs.gov
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Role Confirmation

Pending or Automatic Approval

Once you have completed your role selection, you will be redirected to the **Manage Access** page within gpp.cms.gov to **review** your confirmed or pending role requests.

- Your role request will be **automatically approved** if you're the **first security official** for your organization after the required information you provide is validated.
- Your role request will be **pending approval** if you're an **additional Security Official or Staff User**. Your organization's first Security Official (or other approved Security Officials) will be responsible for reviewing and approving your request.

You will receive a **notification** on the screen that displays the state of your request as well as an **email notification**.

| First Security Official Notification | Additional Security Official Notification | Staff User Notification |
|---|---|-------------------------|
| | | |
| <p>Note: The notification example images featured above are for the practice organization type. All organization types will receive similar notifications for their organization type.</p> | | |

Security Official Automatic Approval

If you are the **first** Security Official, you will be **automatically approved** after the required information you provide is validated.

As the organization's first Security Official, you will be responsible for **approving or denying pending role requests** from other users requesting access to the organization.

Elig Org 20
 TIN: 000594263 | 3519 Cervantes Inlet Suite 4914, Bennettberg, FL 397181713428390

| | | |
|---|--|---|
| <p>USERS</p> <p>36 connected users</p> <p>View users</p> | <p>CMS WEB INTERFACE AND CAHPS</p> <p>CMS Web Interface ✔ Registered</p> <p>CAHPS Survey ✔ Registered</p> | <div style="border: 2px solid red; padding: 5px; display: inline-block;"> <p>YOUR ROLE</p> <p>Security Official</p> </div> |
|---|--|---|

For more information on how to approve other users in your organization, refer to the **Security Officials: Manage Access document** in this [guide](#).

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Additional Security Officials and Staff Users Pending Approval

If you are an additional Security Official or Staff User, your request will be **pending** and sent to the current Security Official at your organization for approval.

The screenshot shows a user interface for 'Manage Access'. The user is Gabrielle Soliz. The page displays a 'Pending Requests' section with one request for Gabrielle Soliz (You), Role: Security Official, Elig Org: 20. The status of the request is 'Waiting for approval from current Security Official(s)', which is highlighted with a red box.

Need to find your organization's Security Official(s)?

If your role request remains in pending state or you do not receive a notification that your organization's Security Official reviewed your role request, contact the Quality Payment Program by phone at 1-866-288-8292 or email gpp@cms.hhs.gov.

Next Steps

- Repeat these [steps](#) as needed to connect to additional organizations.
- **Approved Security Officials** will need to monitor for pending requests from other users requesting access to organization(s) in their Manage Access page.
- Staff Users and additional Security Officials will receive an **email notification** when their request has been approved.
- Follow up with **your organization's current Security Official** if you have concerns with the length of time it's taking for your request to be approved. Instructions on how to do so are available [here](#).
- Review the [frequently asked questions \(FAQs\)](#).

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Frequently Asked Questions

General

1. I can't find my practice when I search for it. What should I do?

Try changing your search criteria – for example, perform a new search using Legal Business Name instead of TIN, or vice versa. If that doesn't work, contact the Quality Payment Program by phone at 1-866-288-8292 (TRS: 711) or by email at gpp@cms.hhs.gov.

Please note that practice information comes from [PECOS](#), and gpp.cms.gov receives [PECOS](#) updates three times per year.

2. What is a PTAN and how do I find it?

Each clinician or provider has a Provider Transaction Access Number (PTAN), associated with their NPI; it was issued at the time of Medicare enrollment and can be found in PECOS.

1. Log into internet-based [PECOS](#).
2. Select **My Associates** on PECOS home page.
3. Select **View Enrollments** by applicable individual or organizational enrollment.
4. Click on **View Medicare ID Report**
5. PTAN(s) are listed in Medicare ID column.

The first Security Official in the practice will need to provide the PTAN associated with an NPI in the practice.

3. Whom do I contact to approve my pending role request?

The first Security Official for an organization will be automatically approved after the required information provided is validated. Once there's a Security Official at your organization, that individual (and all additional security officials) are responsible for approving all subsequent requests.

If you requested Security Official or Staff User access and are awaiting approval from the current Security Official, you may need to reach out to your organization's Security Official. If you don't know who your organization's Security Official is, you can contact QPP by phone at 1-866-288-8292 (TRS: 711) or by email at gpp@cms.hhs.gov.

4. What do I do if the information I provided for my Security Official role request could not be validated?

If you receive a validation error message, please verify and re-enter the required information. If the issue persists, contact QPP for further assistance by phone at 1-866-288-8292 (TRS: 711) or by email at gpp@cms.hhs.gov.

5. What do I do if a Security Official has left my organization?

Have questions? Contact the Quality Payment Program
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If your organization has an additional Security Official(s) who is active with your organization, they may remove the Security Official role for the person who left your organization. Otherwise, contact QPP by phone at 1-866-288-8292 (TRS: 711) or by email at qpp@cms.hhs.gov.

6. What do I do if the current Security Official denied my role request?

If you believe your request was denied in error, you can submit another request. If you are a clinician, you can also request the **Clinician role** (more information available in this [guide](#)), which doesn't require approval by a Security Official.

7. How can I change my role for an organization?

If you need to update your access from:

- Security Official to Staff User, or
- Staff User to Security Official

Contact QPP by phone at 1-866-288-8292 (TRS: 711) or by email at qpp@cms.hhs.gov.

8. Our CPC+ Practice, PCF, ESCO, or OCM Practice Site includes multiple TINs, and I will be the first Security Official. Does it matter which TIN and NPI that I enter for verification?

No, you can provide any TIN/NPI combination that's associated with your CPC+ Practice Site ID, PCF Practice Site ID, OCM Practice Site ID or ESCO ID.

Version History

| Date | Change Description |
|------------|---|
| 04/26/2022 | <ul style="list-style-type: none"> • What is a PTAN? messaging was removed from the Connect to an Organization workflow. Removed reference to modal in this guide. |
| 11/04/2021 | <ul style="list-style-type: none"> • Updated to include information for representatives of Shared Savings Program ACOs to contact their ACO to request a QPP Security Official or Staff User role via the ACO Management System (ACO-MS) • Updated screenshots to remove Shared Savings Program references • Removed submission FAQs |
| 08/04/2021 | <ul style="list-style-type: none"> • Updated to reflect new APM models • Updated performance feedback FAQs for PY 2020 |
| 11/30/2020 | <ul style="list-style-type: none"> • Updated data submission FAQs for PY 2020 • Removed list of APMs from steps 1 and 2 |

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| | |
|------------|---|
| 7/24/2020 | <ul style="list-style-type: none"> • Updated resource to reflect connect to an organization enhancement which allows users to connect to up to 25 practices at one time. • Added a table (Appendix D) with detailed error message information. • Added a FAQ and table (Appendix C) regarding role access and PY 2019 performance feedback |
| 3/20/2020 | <ul style="list-style-type: none"> • Updated resource to include new APMs and search functionalities for registries. • Added Quality Payment Program contact information for those who are hearing impaired. |
| 12/2/2019 | Reviewed and verified the data submission questions are still accurate and relevant for PY 2019 submission. |
| 07/1/2019 | <p>The guide was restructured to shorten it, and new content was added:</p> <ul style="list-style-type: none"> • Updated title to indicate role selection process (select a role) • CEC and OCM information (these models can now get access to their entity) • Clinician role references (new document that outlines this new role) • Role needed for self-nomination (existing Qualified Registries/QCDRs only) |
| 12/18/2018 | Original posting |

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Appendix A | Which Organization Type Do I Select?

| Organization Type | Description | Helpful Hint |
|---|---|--|
| <p align="center">Practice</p> | <p>Connect to a Practice if you represent an organization identified by a single Taxpayer Identification Number (TIN), such as a solo/individual practitioner, group, or hospital including:</p> <ul style="list-style-type: none"> • Groups or clinicians that need to report performance data. • Groups that participate in a Shared Savings Program ACO (all tracks) that need to submit data for the Promoting Interoperability performance category. • Electronic Health Record (EHR) or other Health Information Technology (HIT) third party intermediaries will need to complete this request for each practice they represent/are submitting data for on gpp.cms.gov. | <p>Solo CPC+ practitioners (those who are the only clinician in their Practice Site) will need to connect to an APM Entity to submit their electronic clinical quality measures (eCQMs) for the CPC+ program and view your complete performance feedback.</p> <p>Individual clinicians can also request the clinician role, for more information check out the Connect as a Clinician document in this guide.</p> |
| <p align="center">APM Entity</p> | <p>Connect to an APM Entity if you need to submit quality data on behalf of the entire entity (Bundled Payments for Care Improvement (BPCI) Advanced, Comprehensive Care for Joint Replacement (CJR), Comprehensive ESRD Care (CEC), Comprehensive Primary Care Plus (CPC+), Global Professional Direct Contracting (GPDC), Independence at Home Demonstration, Maryland Total Cost of Care (TCOC), Next Generation ACO, Oncology Care Model (OCM), Primary Care First (PCF), Value in Treatment (ViT) (available with the release of the 3rd eligibility snapshot), Vermont All Payer ACO (VT ACO) or want to view the entity's performance feedback.</p> | <p>You will connect to an APM Entity if you need to perform an action, like submitting quality data, on behalf of the entire Entity or view the Entity's MIPS performance feedback.</p> <p>Unless representing the entire Entity, clinicians, groups and solo practitioners who participate in an</p> |

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| Organization Type | Description | Helpful Hint |
|--|---|--|
| <p align="center">Registry (Including Qualified Registries and QCDRs)</p> | <p>Connect to a Registry if you represent a CMS-approved Qualified Registry or a Qualified Clinical Data Registry (QCDR) and are submitting data on behalf of your clients.</p> <p>Note: If you represent a previously approved Registry or QCDR, you will need the Security Official role to complete the self-nomination application on qpp.cms.gov.</p> | <p>You will connect to a Registry when you are a representative of a Qualified Registry or QCDR.</p> <p>Clinicians, groups, and virtual groups working with a Registry or QCDR for data collection and submission would connect to a Practice (or virtual group as appropriate) to view performance feedback and data submitted on their behalf by those third party intermediaries.</p> <p>Individual clinicians can also request the clinician role, for more information check out the Connect as a Clinician document in this guide.</p> |
| <p align="center">Virtual Group</p> | <p>Connect to a Virtual Group if you represent an approved virtual group as identified by Virtual Group ID.</p> | <p>You will connect to a Virtual Group when you are the virtual group representative.</p> |

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Appendix B | Which Role Should I Select?

| Organization Type | Staff User Role Lets You | Security Official Role Lets You |
|-------------------|--|---|
| Practice | <ul style="list-style-type: none"> ✓ View eligibility information for all clinicians in the practice ✓ Submit data on behalf of the practice, whether reporting individually or as a group ✓ View claims measure data submitted during the performance period submitted ✓ View individual and group MIPS performance feedback and payment adjustment information ✓ Access the Physician Compare (or successor website) Preview ✓ Access cost measure field testing reports ✓ Access APM incentive payments made to a TIN on behalf of an NPI ✓ Request a Targeted Review | <p>Do everything the Staff User can do PLUS:</p> <ul style="list-style-type: none"> ✓ Register a group for the CMS Web Interface ✓ Register a group for the CAHPS for MIPS survey ✓ Approve all additional user requests (manage access to the organization) |
| APM Entity | <ul style="list-style-type: none"> ✓ View a list of participating practices and clinicians in the APM ✓ View eligibility information for participating practices and clinicians in the APM ✓ Submit quality data on behalf of the eligible clinicians in the APM Entity ✓ View MIPS performance feedback ✓ Request a Targeted Review | <p>Do everything the Staff User can do PLUS:</p> <ul style="list-style-type: none"> ✓ Approve or deny role requests from other users requesting access to the organization (manage access to the organization) ✓ Register the Entity for the CMS Web Interface (registration not required for Next Generation ACO models) ✓ Register the Entity for the CAHPS for MIPS Survey |

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| Organization Type | Staff User Role Lets You | Security Official Role Lets You |
|--|--|---|
| Registry (Including Qualified Registries and QCDRs) | <ul style="list-style-type: none"> ✓ Submit data on behalf of all your clients ✓ View preliminary performance feedback for your clients based on the data you submitted on their behalf | <p>Do everything the Staff User can do PLUS:</p> <ul style="list-style-type: none"> ✓ Approve all additional user requests (manage access to the organization) ✓ Complete the self-nomination application on gpp.cms.gov (previously approved third party intermediaries only) ✓ Download your API token |
| Virtual Group | <ul style="list-style-type: none"> ✓ View a list of all the practices and clinicians participating in your virtual group ✓ Submit data on behalf of the virtual group ✓ View virtual group MIPS performance feedback ✓ Access the Medicare Care Compare Preview ✓ Request a Targeted Review | <p>Do everything the Staff User can do PLUS:</p> <ul style="list-style-type: none"> ✓ Approve all additional user requests (manage access to the organization) ✓ Register the virtual group for the CMS Web Interface ✓ Register the virtual group for the CAHPS for MIPS survey |

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Appendix C | PY 2020 Performance Feedback Based on Access

This table provides a snapshot of what you can and can't view within PY 2020 final performance feedback based on your access and organization type.

| With This Access | You CAN | You CANNOT |
|---|---|--|
| Staff User or Security Official for a Practice (includes solo practitioners) | <ul style="list-style-type: none"> ✓ View group-level (practice) performance feedback ✓ View and download clinician-level performance feedback (excluding APM participants) ✓ View and download payment adjustment information for all clinicians in the practice (excluding APM participants) | <ul style="list-style-type: none"> X View APM Entity level performance feedback Example. If you're a Participant TIN in a Shared Savings Program ACO, you will not be able to view performance feedback or payment adjustment information for the ACO (clinicians scored under the APM scoring standard). You will only be able to view feedback on the data submitted at the individual or group level. X View performance feedback for your virtual group |
| Staff User or Security Official for an APM Entity | <ul style="list-style-type: none"> ✓ View and download MIPS performance feedback for the entire Entity ✓ View and download payment adjustment information for all clinicians in the Entity | <ul style="list-style-type: none"> X View the Promoting Interoperability data submitted by individual clinicians and groups in your APM Entity |

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| With This Access | You CAN | You CANNOT |
|--|---|---|
| Staff User or Security Official for a Registry (QCDR or Qualified Registry) | <ul style="list-style-type: none"> ✓ View preliminary scoring for your clients based on the data you submitted for them (same information that was available during the submission period) | <ul style="list-style-type: none"> ✗ View final performance feedback or payment adjustment information for your clients, which may include: <ul style="list-style-type: none"> ○ Data submitted by your clients directly ○ Data submitted by another third party on behalf of your clients ○ Data collected and calculated by CMS on behalf of your clients <ul style="list-style-type: none"> ▪ Cost measures ▪ All-Cause Hospital Readmission measure |
| Clinician Role | <ul style="list-style-type: none"> ✓ View your performance feedback and payment adjustment information for all associated APM Entities, practices, and virtual groups | <ul style="list-style-type: none"> ✗ View performance feedback or payment adjustment information for other clinicians |
| Staff User or Security Official for a Virtual Group | <ul style="list-style-type: none"> ✓ View virtual group-level performance feedback | <ul style="list-style-type: none"> ✗ View performance feedback about data submitted by individuals or practices in your virtual group |

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Appendix D | Role Request Error Messages

If there is an error processing your role request, you will receive an error message. Below is a list of the error messages you encounter along with guidance on how to troubleshoot the error.

| Organization Type | Error Message | Error Cause | Suggestion |
|-------------------|--|---|---|
| All | Our records show that you already have the account access you requested. | You already have the role you're requesting | Review your connected organizations and roles in Manage Access to confirm |
| | We have attempted to complete your request three times. Your request has been sent to the Service Center. You may contact the Service Center at qpp@cms.hhs.gov or 1-8666-288-8292 (TRS: 711) | You exceeded the attempt limit | Contact the service center |
| | You must provide all required information to complete this request. | Your request is missing a TIN | Enter a valid TIN |
| | One or more of the provided TINs is improperly formatted. | Your entered an invalid or incorrect TIN | Re-enter a valid TIN |
| Practice | This requires a single valid TIN. Only one TIN may be provided at a time. | You entered more than one TIN | Enter a single valid TIN for the practice |
| | You must provide all required information to complete this request. | Your request is missing a PTAN or NPI | Enter a valid PTAN or NPI for the practice |
| | We could not validate the TIN/PTAN provided. | You entered an invalid TIN/PTAN combination | Re-enter a valid TIN/PTAN combination |
| Registry | You must provide all required information to complete this request. | Your request is missing a CMS ID | Enter your CMS ID |
| | We could not verify the information you provided. Please try again. | Your CMS ID did not match your Registry | Re-enter your CMS ID |
| | | Your TIN did not match your Registry | Re-enter your TIN |

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| Organization Type | Error Message | Error Cause | Suggestion |
|----------------------|--|--|--|
| APM Entity | You must provide all required information to complete this request. | Your request is missing an Entity ID | Enter your Entity ID |
| | | Your request is for a single TIN APM, but you provided more than one TIN | Enter a single TIN |
| | | Your request is for multi-TIN APM, but you provided a single TIN | Enter all applicable TIN(s) |
| | | (CEC / OCM) Your request is missing a TIN, APM ID, or NPI | Enter applicable TIN, APM ID, and/or NPI |
| | | (CEC / OCM) You entered invalid NPI(s) for a given TIN | Enter valid NPI(s) associated with TIN |
| Virtual Group | This request requires at least two valid TINs. | You entered less than two TINs provided | Enter two valid TINs |
| | You must provide all required information to complete this request. | Your request is missing a Virtual Group ID | Enter Virtual Group ID |
| | We could not locate a Virtual Group associated with the Virtual Group ID provided. | You entered an invalid Virtual Group ID | Re-enter Virtual Group ID |
| | We could not verify the information you provided. Please try again. | We were unable to validate TINs provided | Re-enter information |

If the issue persists, you can also close out of your current Connect to an Organization attempt and submit a new request later or contact the Quality Payment Program for assistance.

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