Sign-Up Portal

Quick Start Guide - Version 1.0

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Environment

FIGmd is committed to the conservation of natural resources and reducing its overall burden on the environment. Please consider the environment before printing this document.

New User - Registration

Register to get access to the Sign-Up Portal

Registered User - Login

Option for registered users to log into the portal

Post-Registration

Email link to access the Pegasus dashboard

Forgot Password

Link to reset forgotten password

Sign-Up Portal

Organization

Milestone 1

Provide organization, contact and TIN details

Technical Survey

Milestone 2

Specify data submission method: Electronic (Pull / Push) or Manual

Clinicians/Locations

Milestone 3

Provide clinician and location details

Agreement

Milestone 4

Sign the Registry Participation agreement & FIGmd agreement

Payment

Milestone 5

Provide details about the mode of payment

Introduction

Pegasus 2.0 has new features which include a new registration & sign-up portal for onboarding, my Account for administrative tasks, smart service desk integration for seamless integration of Service Desk, RPC/SPINE/File Distributor enhancements to increase efficiency of EMR extraction, and Janus enhancements for optimized operations.

The new **Sign-Up portal** has a single database for Pegasus, JANUS, registration portal, sign-up portal, and RPC Management HUB unlike the previous version. This offers several advantages such as no manual syncing of data, single point of access for all data, faster & lucid sign-up process, better coordination for Elixir participants, and ability to centrally participate and manage multiple programs.

It offers multi-tenant registration for sign-up and various other features such as capturing new details, and personalizing and customizing the administrative space. There are multiple payment plans for practices, groups, ACOs, etc. Users can customize agreements for practices, groups and ACOs.

The sign-up process is divided into five major milestones namely, capturing organizational & contact details, feeding clinician information and their location, signing agreements, selecting the preferred mode of data exchange (either FIGmd's enterprise connectors or manual upload), and selecting subscription plans.

Contact Us

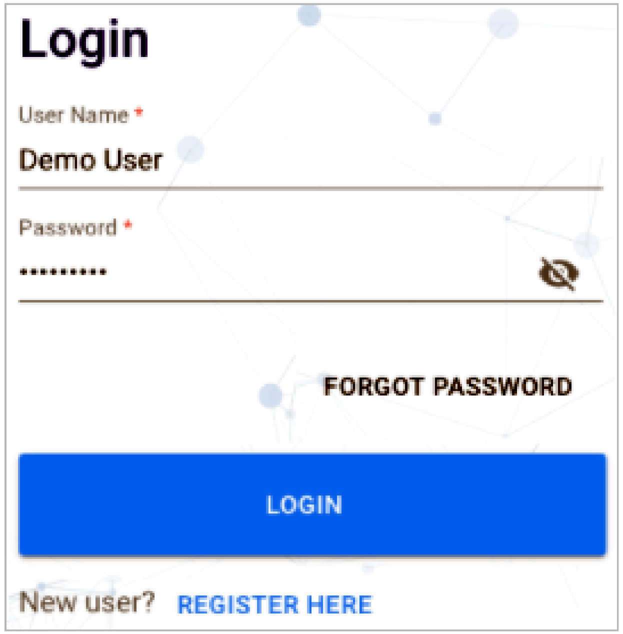
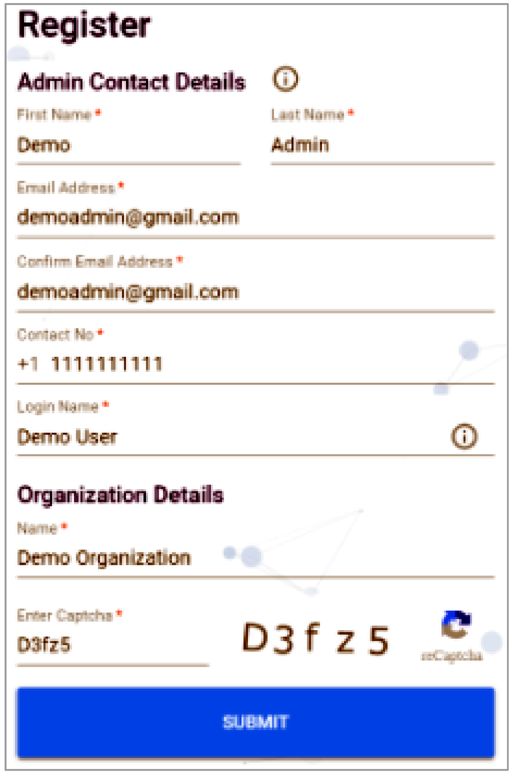
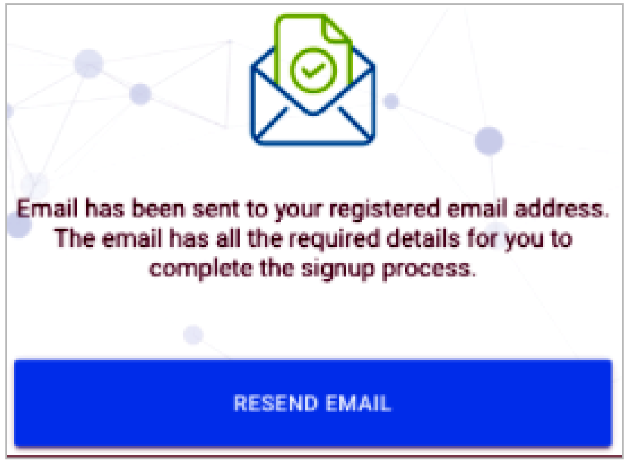
E-mail

APTACAMS@figmd.com

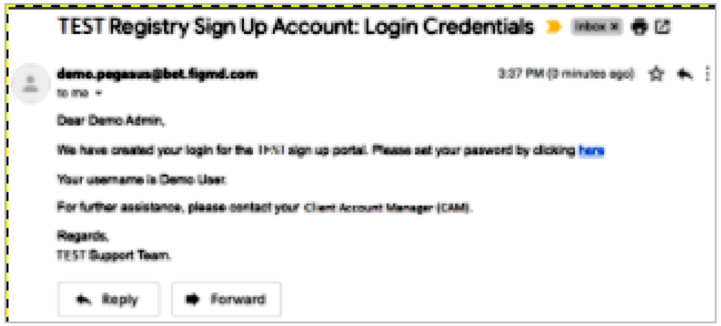
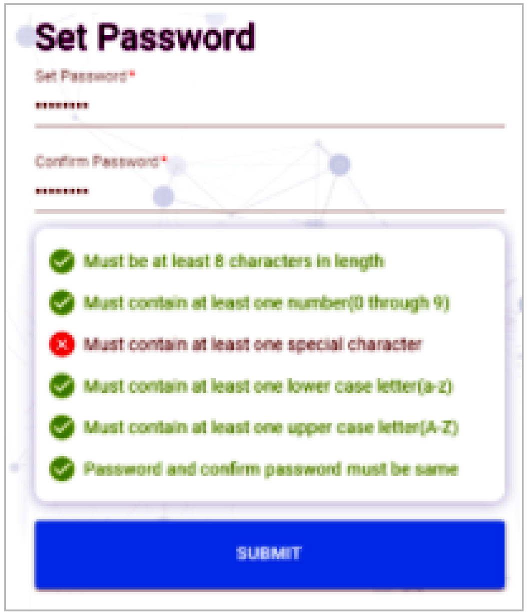
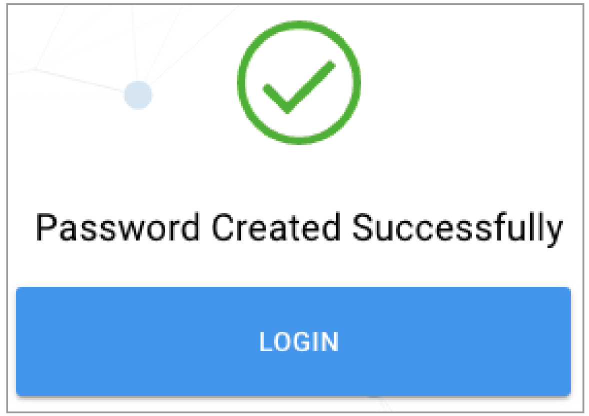
Document Conventions			
	Toggle to view or hide the password in the password field.		Provides additional details about the respective field.
*	Represents mandatory fields.		Enables to search for a record.
	Represents the completed milestone.		Represents the in progress milestone.
	Expand to view the information in the milestone.		Collapse to close the information in the milestone.
	Enables to edit the details of a record.		Enables to delete the record.
	Enables to download the document.		

New User Registration

New users have to register themselves to access the Sign-Up portal using the link provided by the Registry.

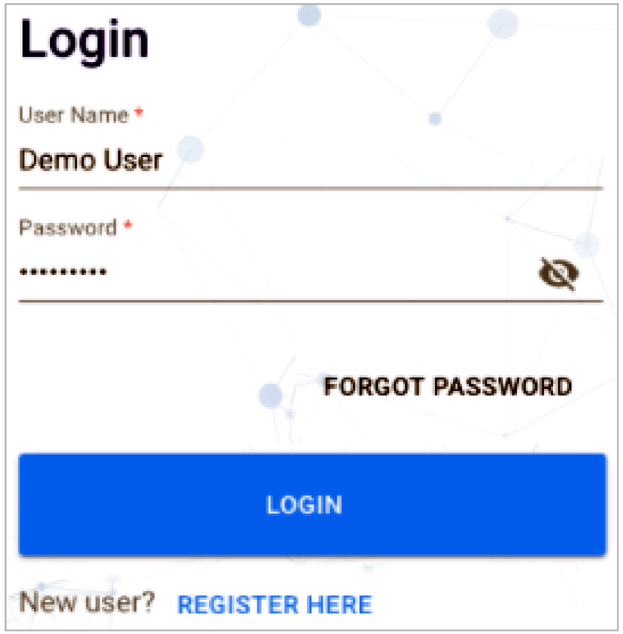
<table>
<tr><th>Step 1: Access Registration Link</th><th>Step 2: Registration Details</th><th>Optional Step</th></tr>
<tr>
<td>
</td>
<td>
</td>
<td>
</td>
</tr>
<tr>
<td>1. Register yourself using the REGISTER HERE link.</td>
<td>2. Provide details about your admin and organization in the registration window.
3. Enter displayed Captcha [1]code.
4. Click SUBMIT.</td>
<td>Email is sent to your registered email address.
• Click RESEND EMAIL, if you have not received the email.</td>
</tr>
</table>

[1] ***Captcha** is provided for an additional level of security and is case-sensitive. Regenerate Captcha if expired or not legible.*

Step 3: Login Credentials Email	Step 4: Set Password	Step 5: Access Login Page
		
5. Click on the link provided in the email to set your password.	6. Set your password as per the password criteria. 7. Click **SUBMIT**. **Note**: ● Green checkmark indicates that the password criteria has been met. ● Red **X** indicates that the password criteria has not been met.	8. Click **LOGIN** to access the login page.

Registered User Login

Registered users can log into the Sign-Up portal using the link provided by the Registry.



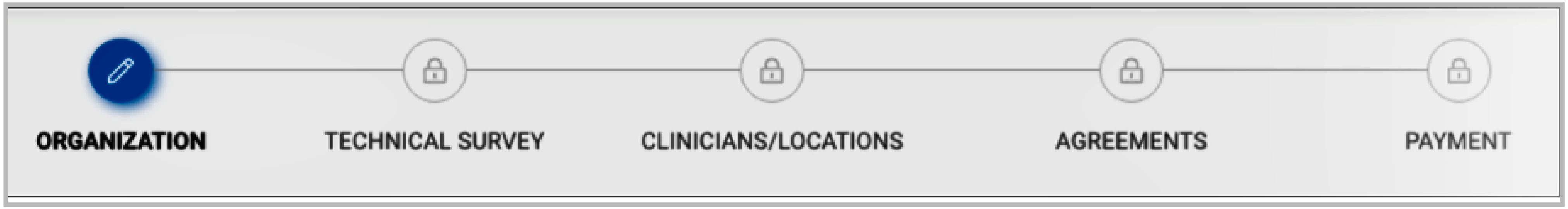
1. Enter your credentials on the Login page.
2. Click **LOGIN**.
   Successful login navigates to the Sign-Up Portal.

Optional: Click FORGOT PASSWORD link to reset a forgotten password.

Note:

- Use the same credentials used while registering with the portal.
- Toggle the eye icon in the password field to view or hide the password.

Sign-Up Portal



Sign-Up portal has five milestones to capture information required and relevant to the sign-up process.

1. Organization
2. Technical Survey
3. Clinicians/Locations (Locations - configurable as per Registry)
4. Agreements
5. Payment

Note:

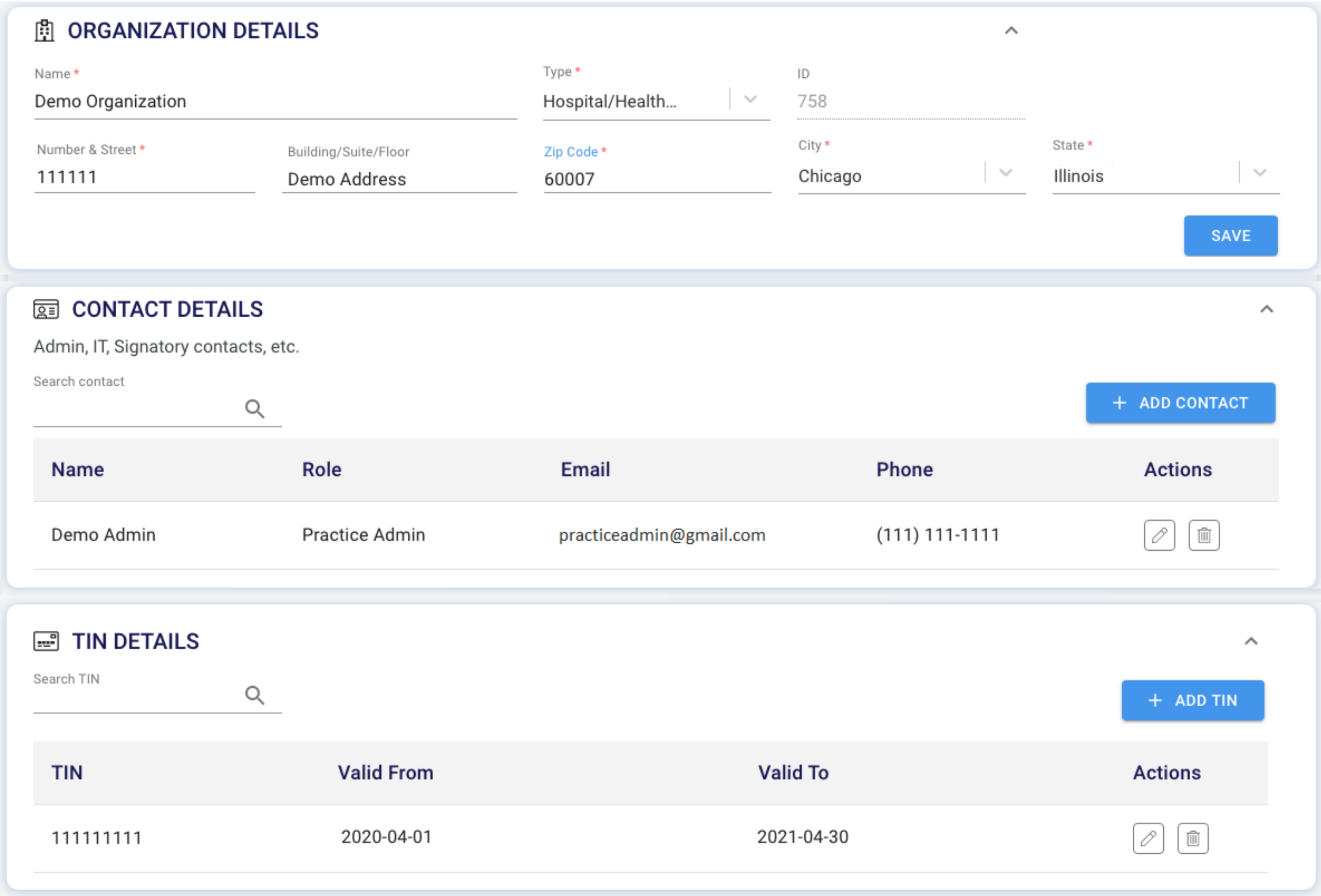
Each of the milestones and the order of display is configurable as per Registry requirement.

Milestone 1: Organization

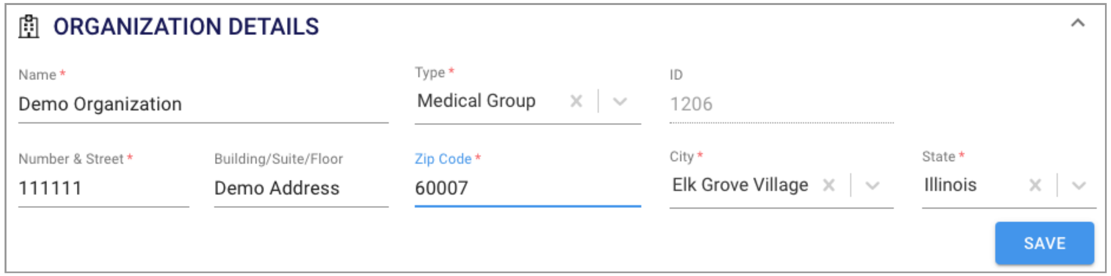
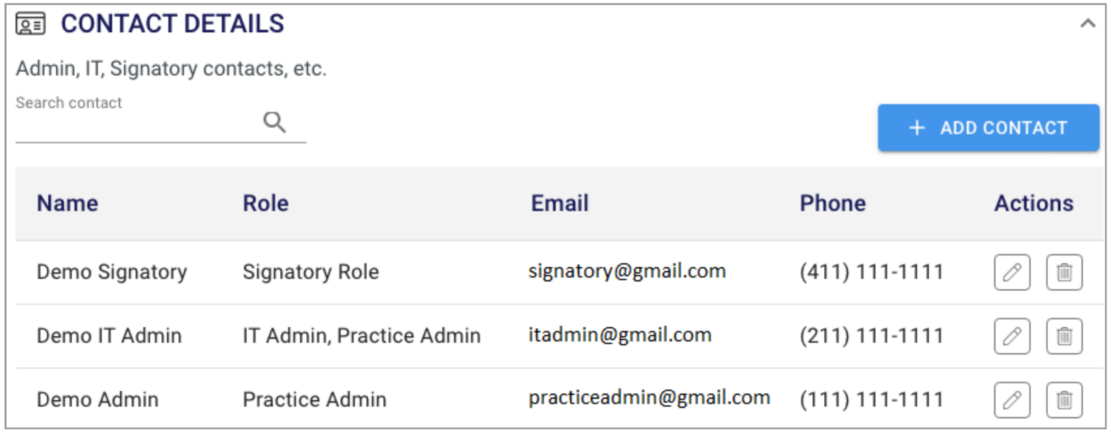
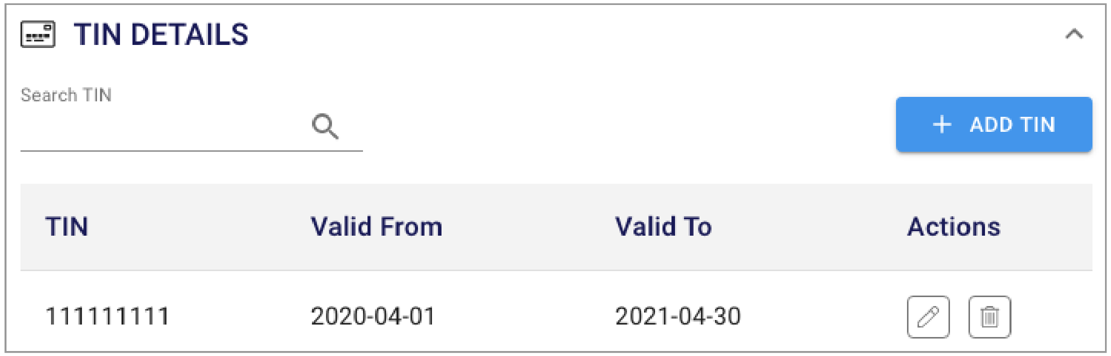
Organization	Technical Survey	Clinicians/Locations	Agreement	Payment

1. Organization

Organization is the first milestone. This milestone captures the demographic information about your organization, details about your admin, IT, and the signatory contacts, and details of the TIN[2]s under which your organization is billing.



[2] ***Tax Identification Number*** *is an identifying nine-digit number used for tax purposes in the United States.*

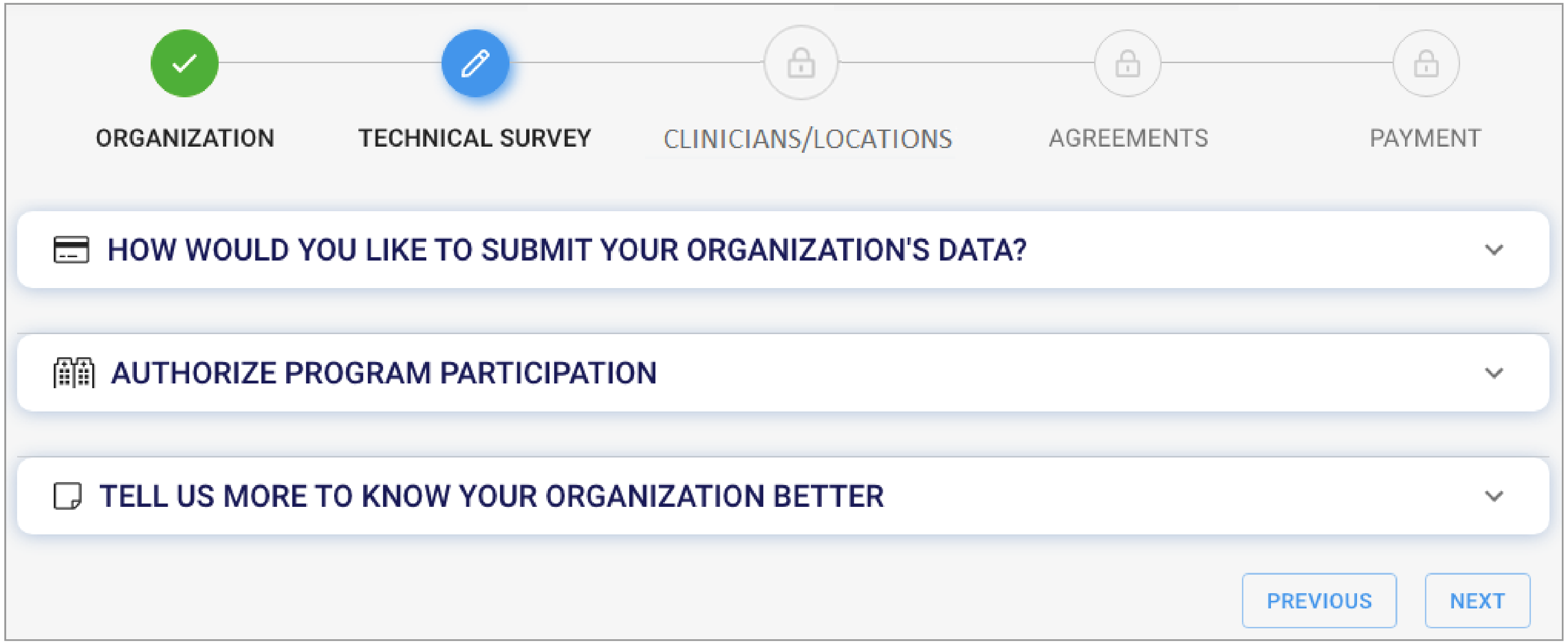
Organization Details		1. Enter demographic details of your organization. 2. Click **SAVE**. **Note**: ● Practice ID is auto-generated by the system, auto-populated and non-editable. ● On entering Zip code, City and State are auto-populated.
Contact Details		Add /Edit or Delete the contact details. 3. Click **ADD CONTACT**. **Optional**: Click the **Edit** or **Delete** icons to update existing contacts. **Note**: ● Contact details can be added for: ○ Practice Admin ○ IT Admin ○ Signatory contact ● To search for an existing contact, type the name, role, email or phone number in the search field.
TIN Details		Add, Edit or Delete the TIN details. 4. Click **ADD TIN**. **Optional**: Click the **Edit** or **Delete** icons to update existing TINs. **Note**: ● Multiple TINs can be added. ● To search for an existing TIN, type the TIN number or TIN validity dates in the search field.

Milestone 2: Technical Survey

Organization	Technical Survey	Clinicians/Locations	Agreement	Payment

2. Technical Survey

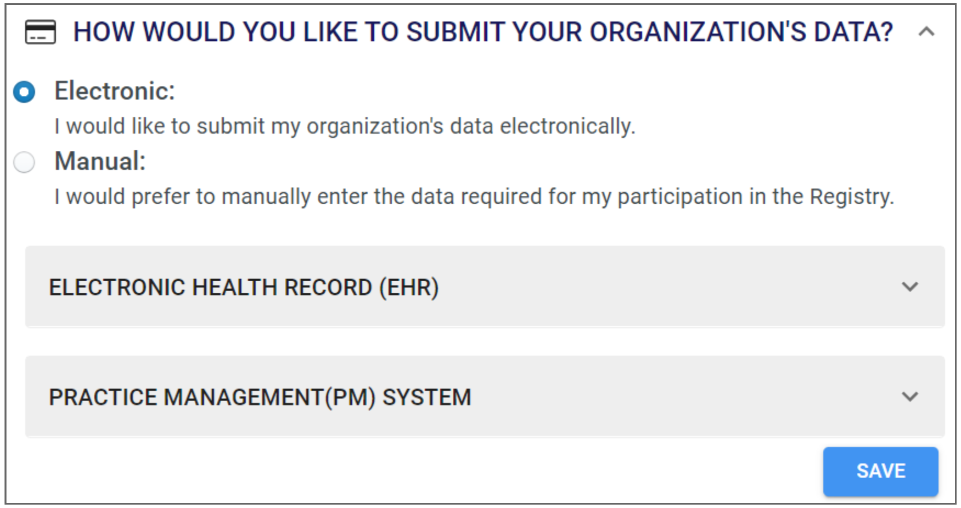
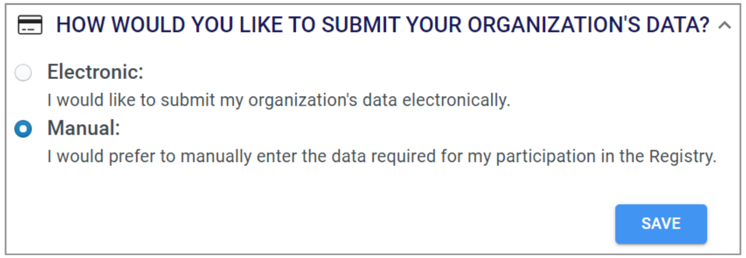
Technical Survey is the second milestone. This milestone captures information about the data submission method selected by your organization.

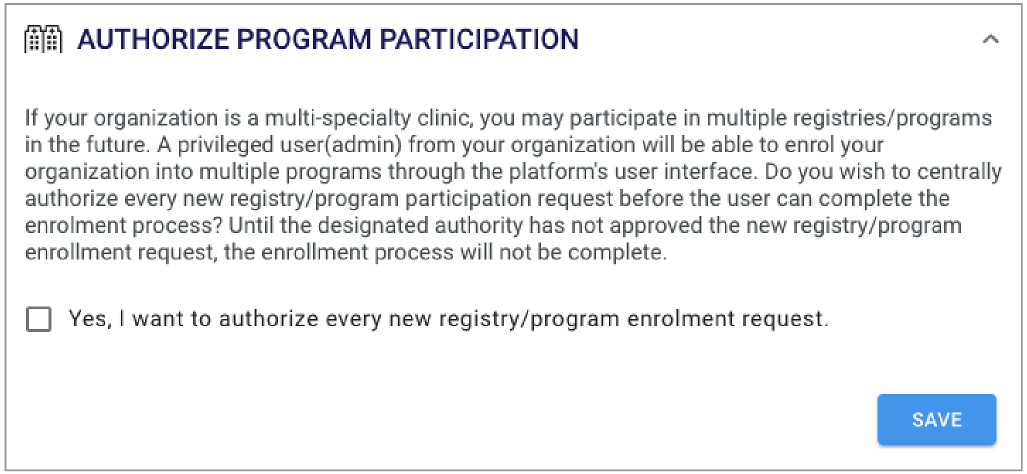
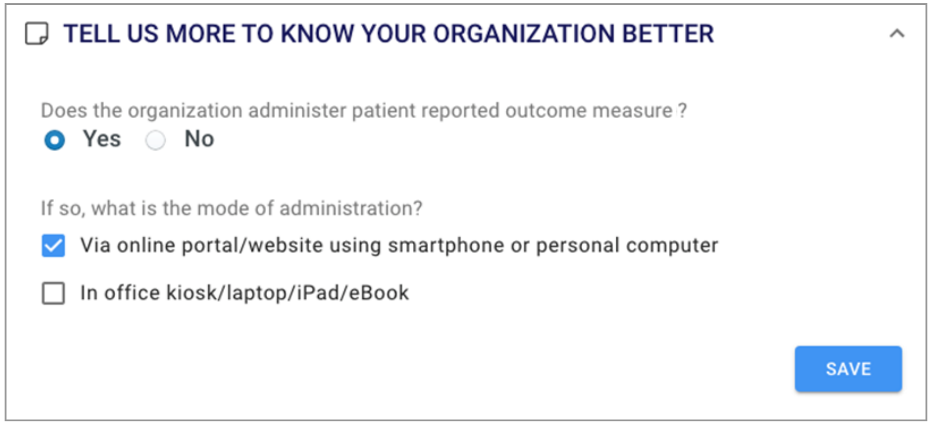


The three sections of the **Technical Survey** include:

- Method to submit organization data
- Authorize program participation
- Know about the organization

1. Method to submit organization data

<table>
<tr>
<td colspan="2">
</td>
<td>
</td>
</tr>
<tr>
<th colspan="2">Electronic Data Pull Push</th>
<th rowspan="2">Manual Data Entry</th>
</tr>
<tr>
<th>Electronic Data Pull</th>
<th>Electronic Data Push</th>
</tr>
<tr>
<td>FIGmd Enterprise Connector is installed and interfaces with the practice EHR/PM system</td>
<td>FIGmd Enterprise Connector is installed and interfaces with the practice EHR/PM system</td>
<td>Manually enter data using a webtool.</td>
</tr>
<tr>
<td>Provide the details of your EHR system
Provide the details of your PM system.
Click SAVE.
Note: If your EHR is cloud-based, please contact APTACAMS@figmd.com to ensure we are able to work with your EHR before completing the sign-up.</td>
<td>Select the file format from the drop-down.
Click SAVE.
Note:
Supported file formats: QRDA, CCDA, Custom XML, CSV, text, dat, json etc.
Unsupported file formats: Excel based files like XLS or XLXS, Rich Text Format (RFT) and Crystal reports etc.</td>
<td>Choose the Manual Data Entry option.
Click SAVE.</td>
</tr>
</table>

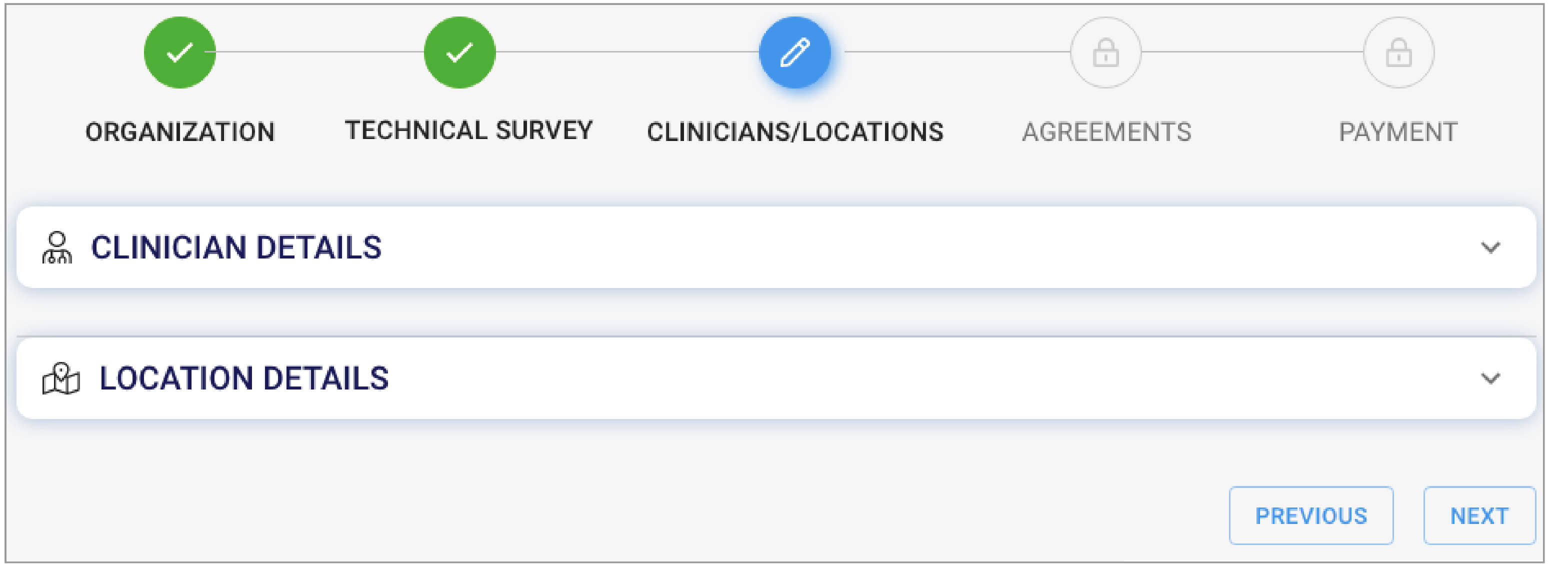
<table>
<tr><th>2. Authorize program participation</th><th>3. Tell us more about your organization</th></tr>
<tr><td>
</td><td>
</td></tr>
<tr><td>Centrally authorize every new registry/program participation before completion of user enrollment.</td><td>Specify your organization details.</td></tr>
<tr><td>Select the checkbox to authorize program participation.</td><td>Select the appropriate option.
Click SAVE.</td></tr>
</table>

Milestone 3: Clinicians/Locations

Organization	Technical Survey	Clinicians/Locations	Agreement	Payment

3. Clinicians/Locations

Clinicians/Locations is the third milestone. Captures the information about the clinicians/locations associated with your organization.

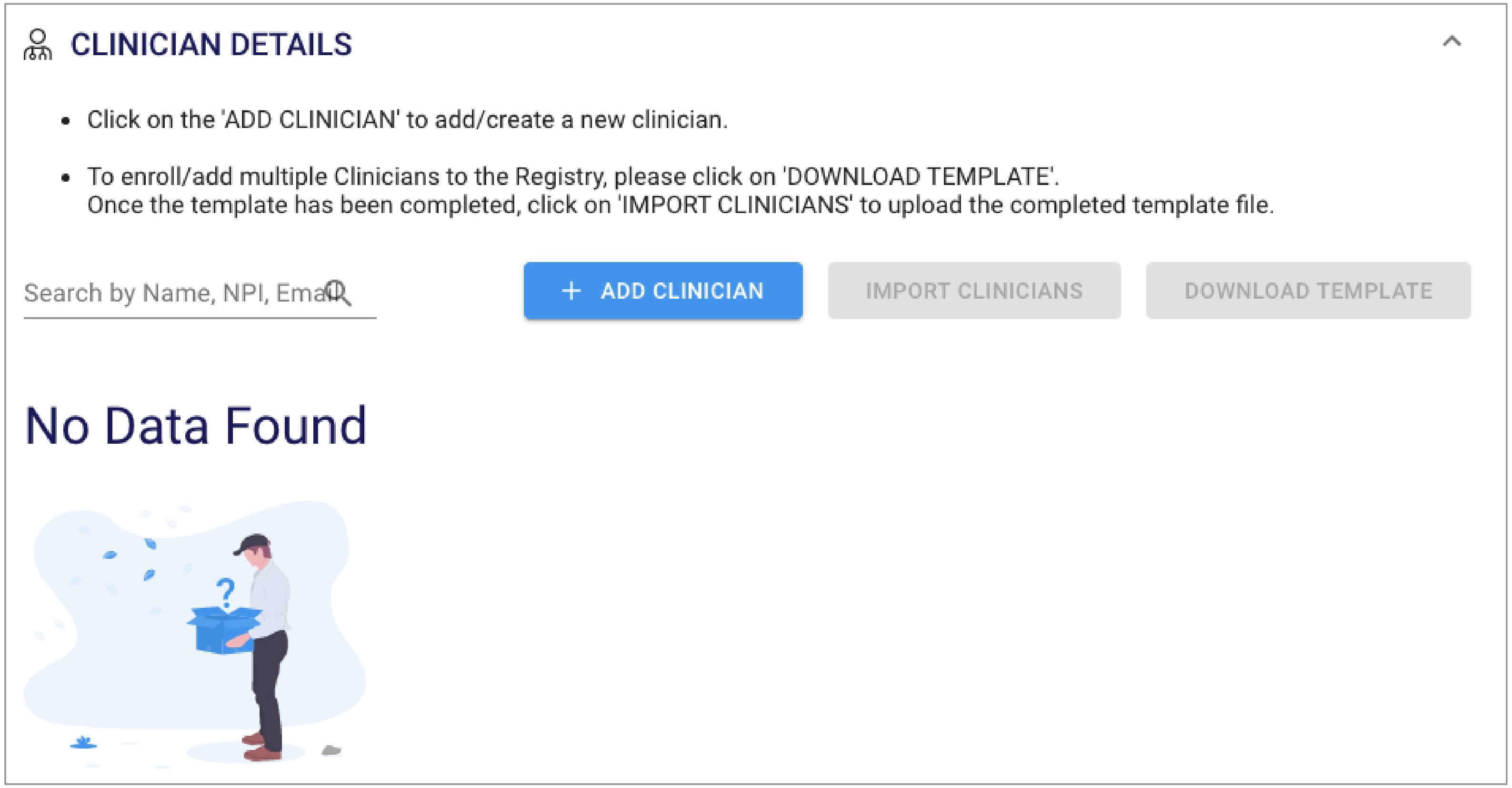


Two sections:
- Clinician Details
- Location Details (configurable as per Registry)

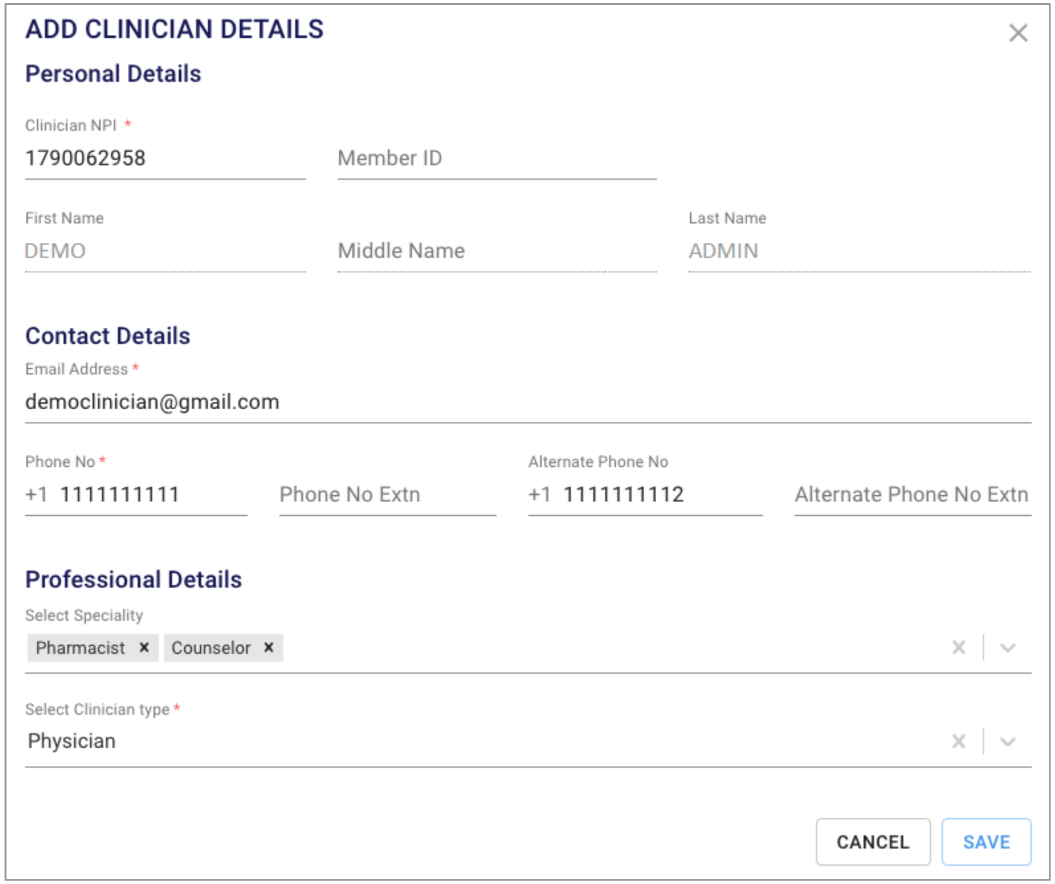
Clinicians Details

Clinician Details section captures details of the clinicians associated with the organization. It enables to add new clinicians and edit or delete existing clinician details.
New clinicians can be added individually or can be imported in bulk:

- Individual (+ Add Clinician)
- Bulk (Import Clinicians)



Add Individual Clinician



Add Clinician Details page captures the personal, contact and professional details of the clinician.

1. Click **+ ADD CLINICIAN** on the landing page of the milestone.
2. Provide the clinicians details on the **ADD CLINICIAN DETAILS** page.
3. Click **SAVE**.
   Newly added clinician is displayed in the grid.

Note:

- On entering the Clinician NPI, the fields firstname, last name, phone number, and specialty are auto-populated.
- First name and last name fields are not-editable.
- Clinician Type:
  - Physician
  - Nonphysician
- Multiple specialties can be added.

Add Clinicians in Bulk

id	npi	firstname	middlename	lastname	emailaddress	memberid	contactnumber	alternatecontactnumber	speciality	cliniciantype
1	1111111115	Demo		Clinician	demo@gmail.cor	11115	5111111111		Emergency	Physician
2	1111111116	Test		Clinician	test@gmail.com	11116	6111111111		Ophthalmology	Nonphysician

To import clinicians in bulk:

1. Click **DOWNLOAD TEMPLATE** [3].
2. Enter the clinicians details in the downloaded template file and save.
3. Click **IMPORT CLINICIANS** to upload the saved file.
   Imported clinicians are displayed in the grid.

[3] *Template file is in XLS format with predefined columns*

CLINICIAN DETAILS

- Click on the 'ADD CLINICIAN' to add/create a new clinician.
- To enroll/add multiple Clinicians to the Registry, please click on 'DOWNLOAD TEMPLATE'.
  Once the template has been completed, click on 'IMPORT CLINICIANS' to upload the completed template file.

Search by Name, NPI, Email

+ ADD CLINICIAN | IMPORT CLINICIANS | DOWNLOAD TEMPLATE

Name	NPI	Member ID	Email	Phone	Member Status	Actions
DEMO CLINICIAN	1790062958		democlinician@gmail.com	+1 1111111111	✕	

Locations Details

Location Details section captures details of the locations associated with the organization. It enables users to add new locations, and edit or delete existing location details.

1. Click **+ ADD LOCATION**.
2. Provide the necessary details in the **Add Location Details** window.
3. Click **SAVE**.
   Newly added location is displayed in the grid.

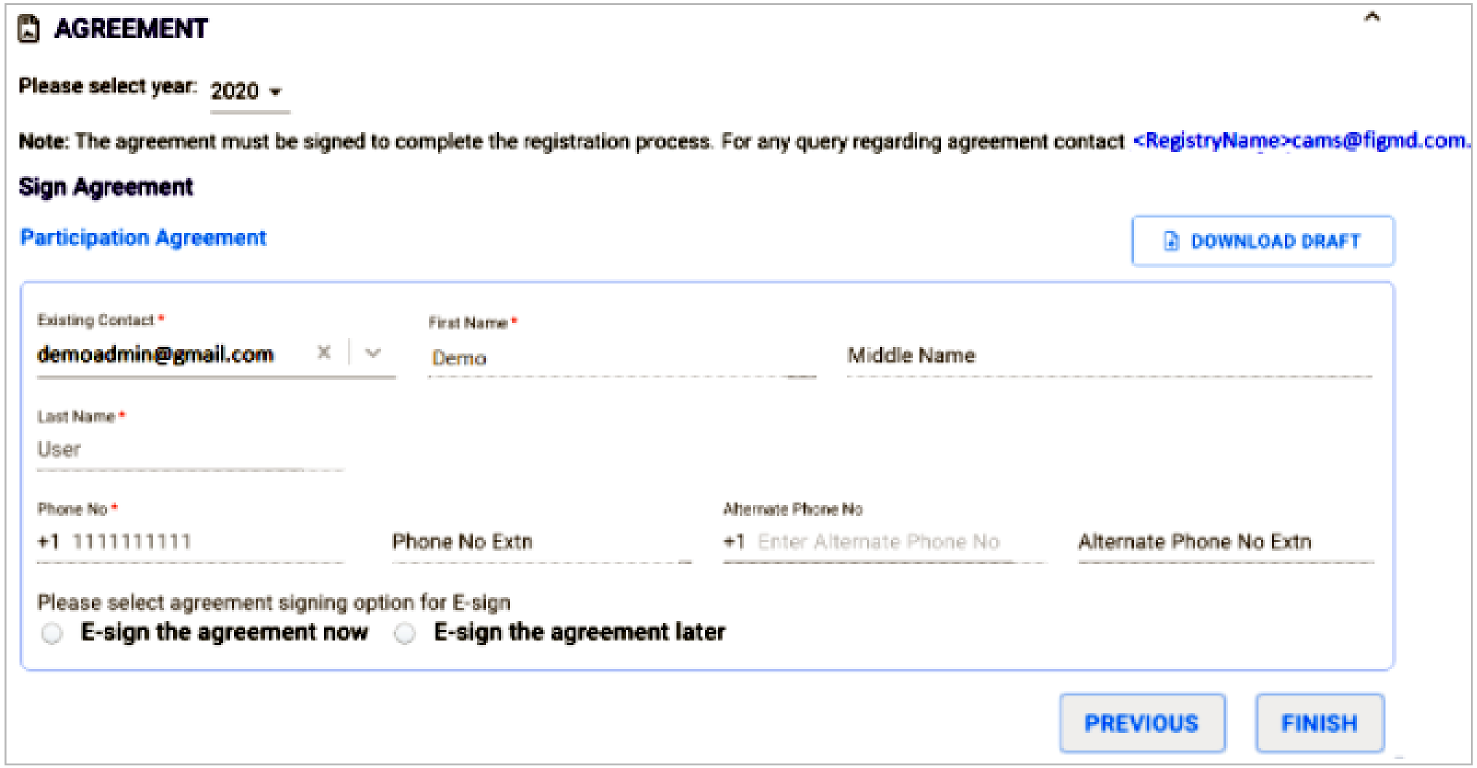
(**Optional**) Search for a location by typing the location details in the search field.

Milestone 4: Agreement

Organization	Technical Survey	Clinicians/Locations	Agreement	Payment

4. Agreement

Agreement is the fourth milestone. It involves signing of the agreement by the authorized signatory to complete the registration process. There are two agreements: Registry Participation[4], and FIGmd Agreement[5] which are configured as per registry specification.
Both these agreements involve the practice giving permission to the Registry and FIGmd respectively to view and access practice data.



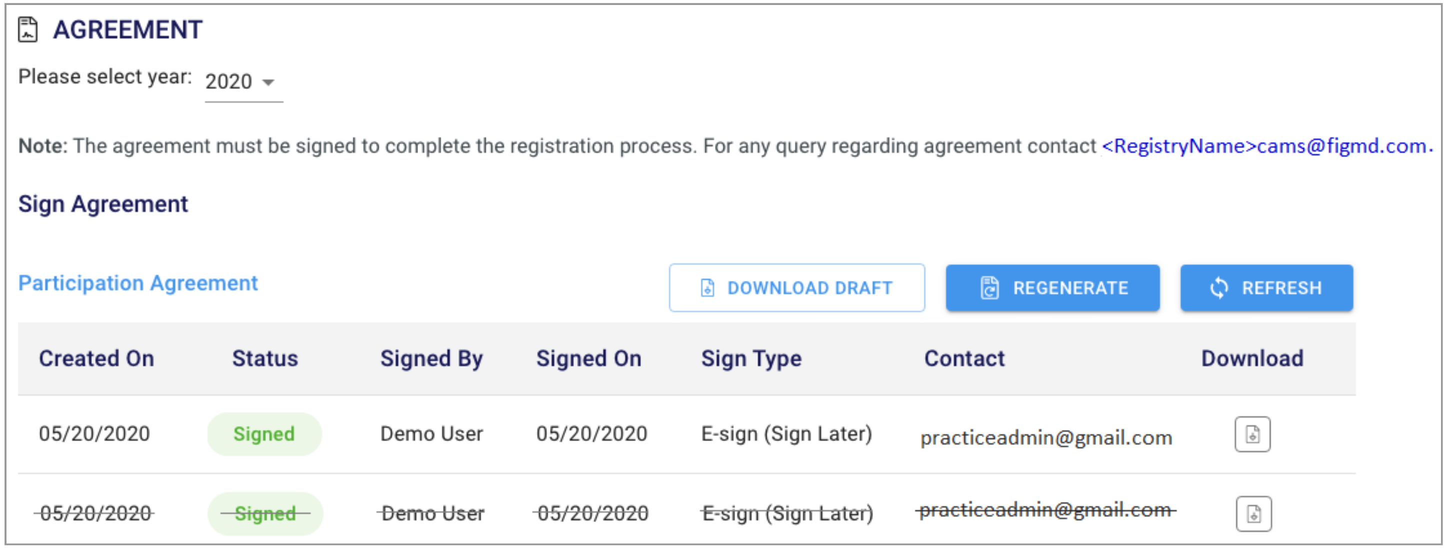
There are two agreement E-signing options

- E-sign the agreement now
- E-sign the agreement later

[4] *Between the Registry and FIGmd.*
[5] *Between FIGmd.and Practice*

<table>
<tr><th colspan="2">E-sign</th></tr>
<tr><td colspan="2">The E-signing tool is an online electronic signature service to facilitate the user to sign a document digitally. Options of E-sign include tools such as DocuSign, EchoSign, or RightSignature.</td></tr>
<tr><th>E-sign the agreement now</th><th>E-sign the agreement later</th></tr>
<tr><td>Use this option to sign the agreement in real time if you are the authorized signatory and would like to sign the agreement right away.
Steps:
1. Select E-sign now agreement signing option.
2. Initiate E-Signature process.
3. Create E-Signature.
4. Sign the agreement.
5. Accept Terms & Conditions to complete the signing process. You receive a confirmation email.
6. (Optional) Review signed agreement.</td><td>Use this option if you are not the authorized signatory or would like to review the agreement and sign it at a later date or time.
Steps:
1. Select E-sign later agreement signing option. You receive an email with an Agreement link.
2. Click the Agreement link in the email.
3. Initiate E-Signature process.
4. Create E-Signature.
5. Sign the agreement.
6. Accept Terms & Conditions to complete the signing process. You receive a confirmation email.
7. (Optional) Review signed agreement.</td></tr>
<tr><td colspan="2">The agreement grid is updated with the agreement details. An agreement is in the Pending status till it is signed.</td></tr>
</table>

Agreement Grid



Regenerate option enables the authorized signatory to re-sign an already signed agreement. An agreement not signed in the first place, or change in the authorized signatory, are the possible reasons for re-signing.

To re-sign an agreement:

1. Click **REGENERATE**.
2. Select the appropriate signing option, E-sign now or E-sign later.
3. Follow the steps mentioned in the Signing Process.

   Optional: Click **REFRESH** to update the agreement status in the grid.

Note:

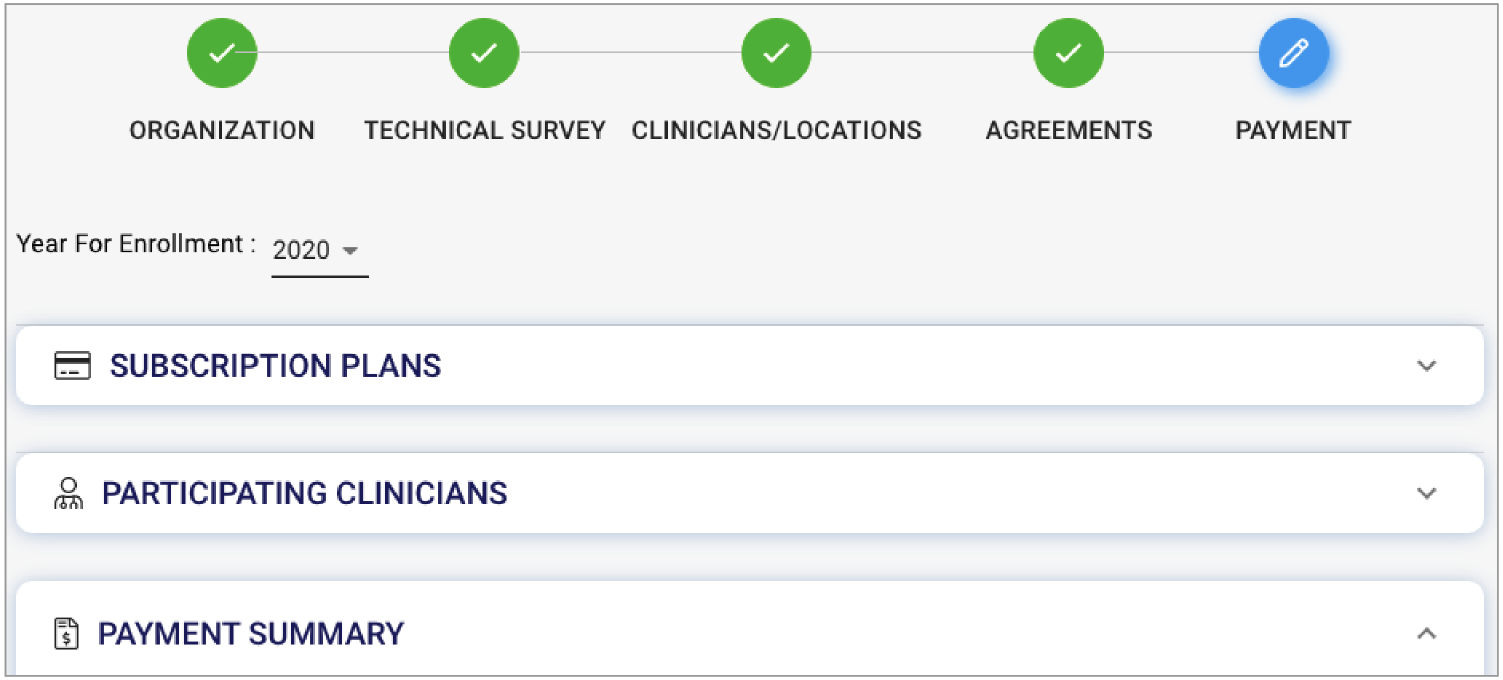
- On re-signing the agreement, the previously signed agreement record is discarded (struck out), and a new agreement record with status as **Pending** is added to the grid.
- Download the signed agreement for your reference.

Milestone 5: Payment

Organization	Technical Survey	Clinicians/Locations	Agreement	Payment

5. Payment

Payment is the last milestone of the sign-up process. In this milestone, you can select a plan for the enrolling year and pay for it as per the number of participating clinicians.

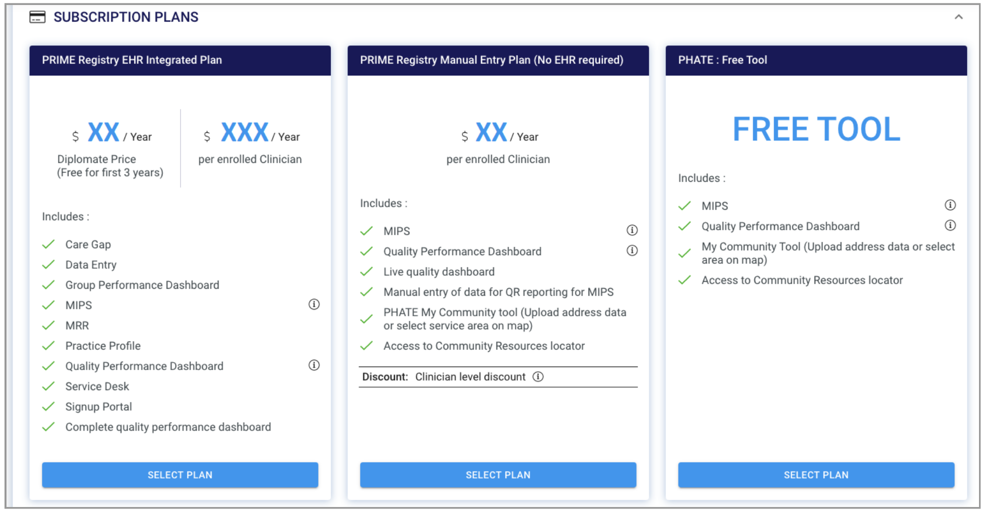


There are three sections to the payment process:

- Subscription Plans (configurable as per Registry)
- Participating Clinicians
- Payment Summary

1. Subscription Plans

Subscription Plans displays available subscription plans:
Each plan includes specific pre-selected modules.



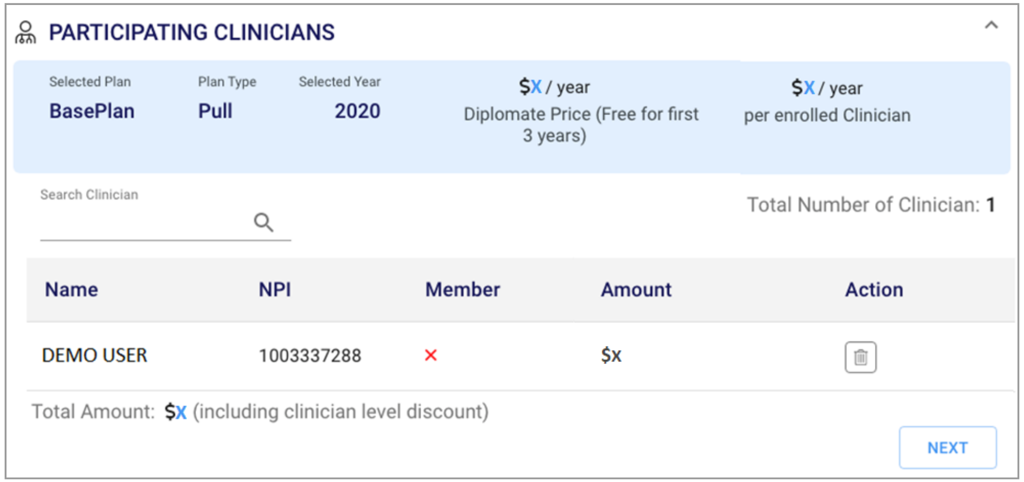
- Select the appropriate Plan.

  Successful plan selection navigates to the **Participating Clinicians** section.

2. Participating Clinicians

Participating Clinicians option displays a list of all the clinicians who are added in the Clinician milestone, along with the total amount payable.

Base Plan is autoselected.



- Click **CHANGE PLAN**, if you wish to change the default subscription plan.
- Click **NEXT**.
  Navigates to the **Payment Summary** page.

Note:

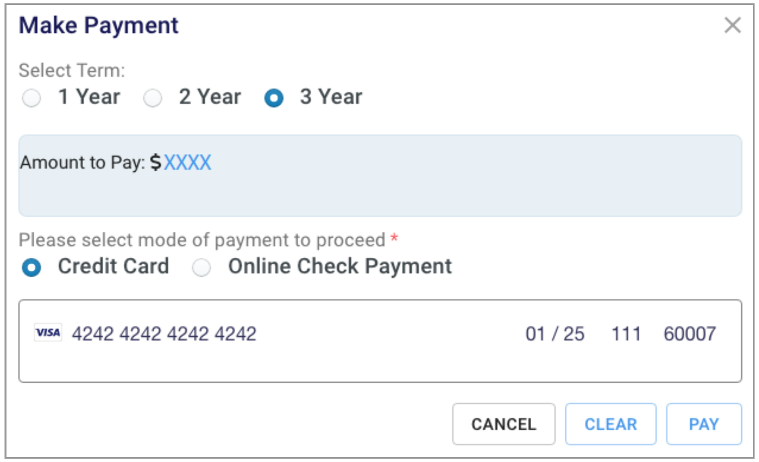
- Non-participating clinicians can be removed from the list using the delete icon and the total payment amount is altered accordingly. These clinicians are only removed from the participating clinicians list and not from the clinicians milestone.

3. Payment Summary

Payment Summary section allows review of the captured payment details before initiating the payment process.

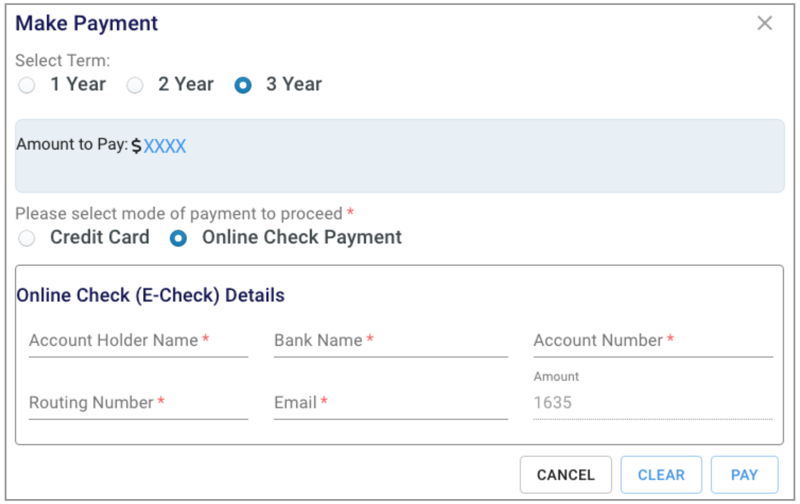
1. Verify the displayed payment details.
2. Click **REVIEW TO PAY**.
   Navigates to the **Make Payment** page.
3. Select the registration term period.

Credit Card



- Select the Credit Card option.
- Provide the card details.
- Click **PAY**.

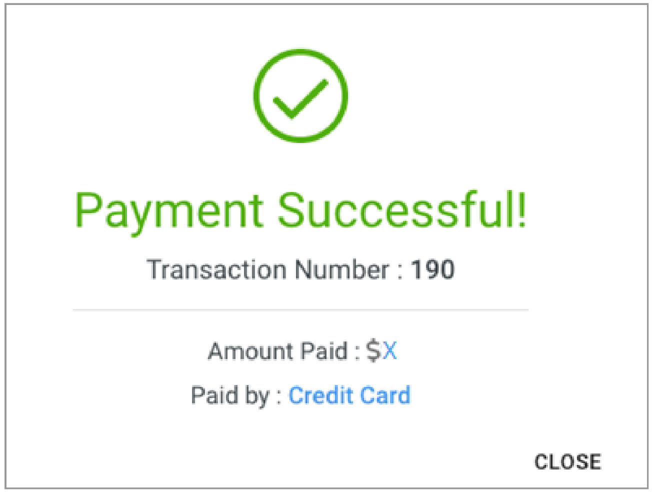
Online Check Payment



- Select the Online Check Payment.
- Provide the bank account (E-check) details.
- Click **PAY**.

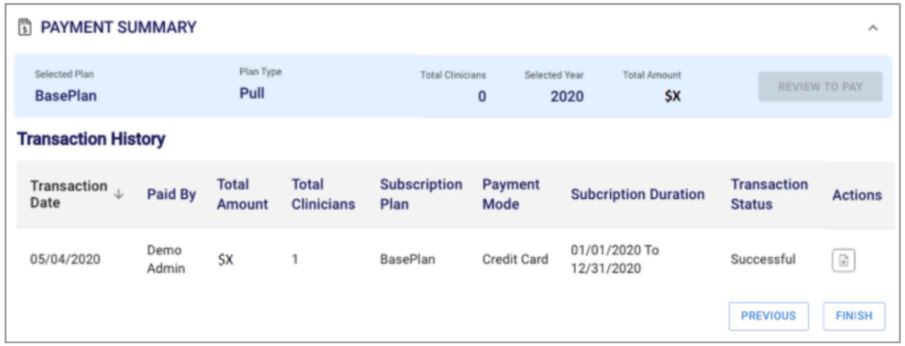
View Payment and Transaction Summary

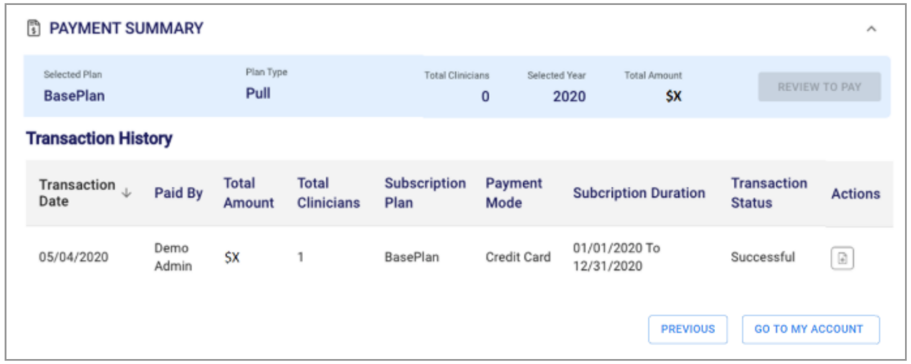
Payment Details



- Success message is displayed on a successful payment.
- Click **CLOSE**.
  Navigates to the **Transaction History** grid.

Transaction History





Transaction History grid displays details of all the previous payments sorted by the transaction date.

- Click **FINISH**.
  FINISH button changes to **GO TO MY ACCOUNT** to access the **My Account** page.

Note:

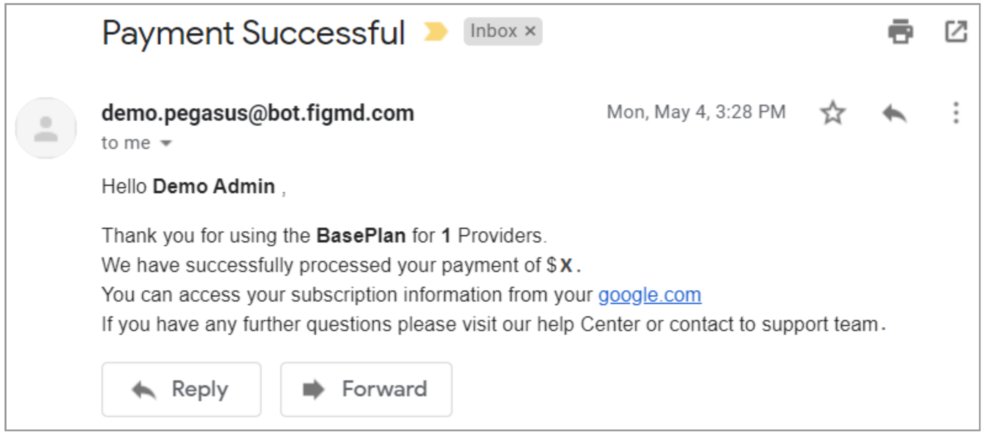
- Download the transaction history file in the PDF form using icon in the Action column.
- For **Online Check Payment**, the transaction status is initially **Pending**. After receiving clearance from the bank, it changes to **Successful**.

Post Sign - Up

On a successful payment, two emails are received at your registered email address.

- Payment Successful
- Enrollment Completion

Payment Successful	Enrollment Completion
(see below)	(see below)
Payment Successful email contains the details of your subscription plan and payment.	**Enrollment Completion** email contains your username and a link to access the Pegasus dashboard.



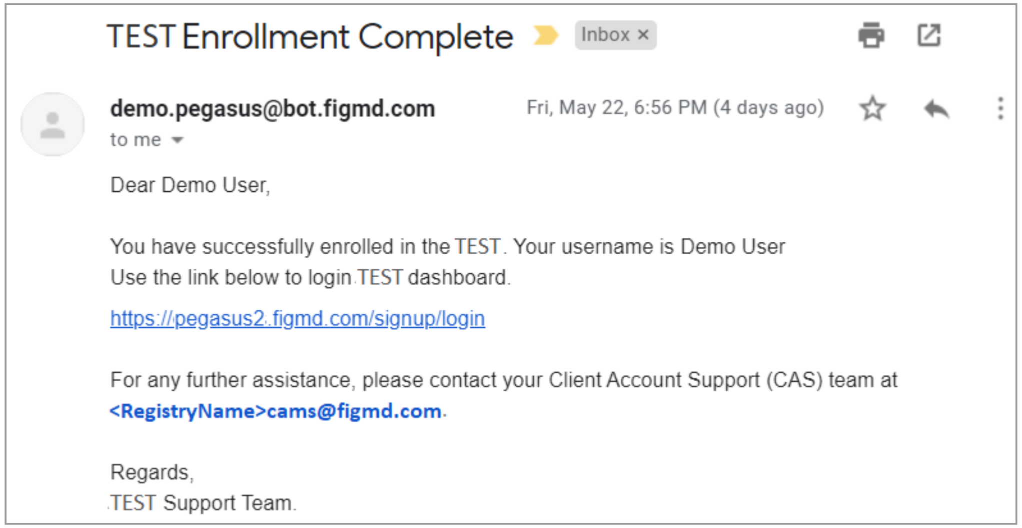
Payment Successful Inbox ×

demo.pegasus@bot.figmd.com Mon, May 4, 3:28 PM
to me

Hello **Demo Admin** ,

Thank you for using the **BasePlan** for **1** Providers.
We have successfully processed your payment of $ **X** .
You can access your subscription information from your google.com
If you have any further questions please visit our help Center or contact to support team.

Reply Forward



TEST Enrollment Complete Inbox ×

demo.pegasus@bot.figmd.com Fri, May 22, 6:56 PM (4 days ago)
to me

Dear Demo User,

You have successfully enrolled in the TEST. Your username is Demo User
Use the link below to login TEST dashboard.

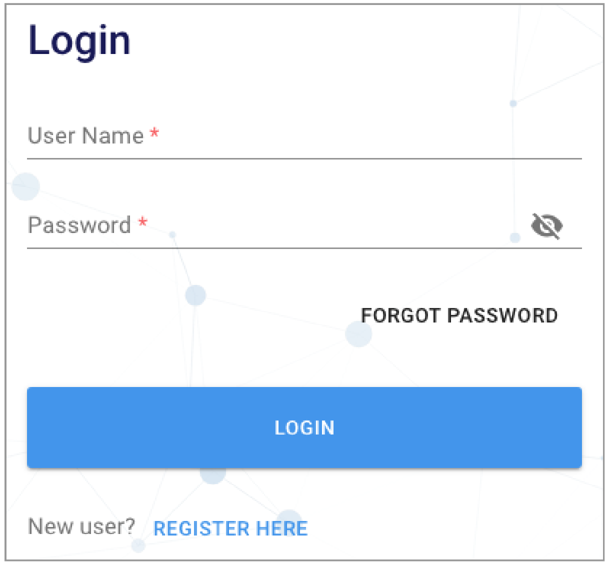
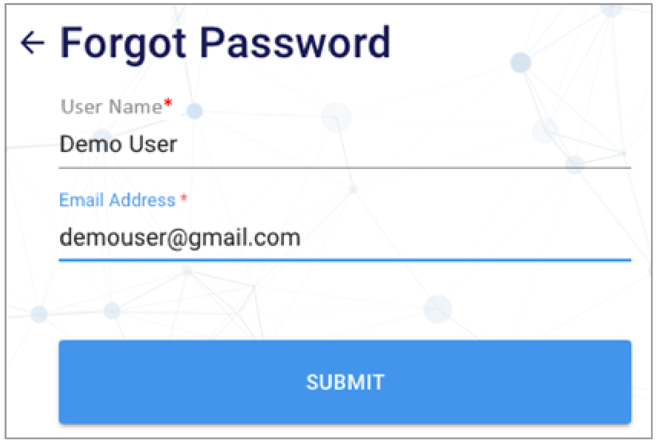
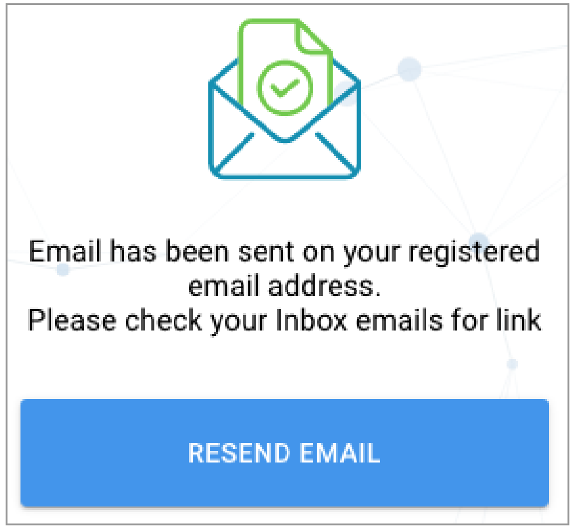
https://pegasus2.figmd.com/signup/login

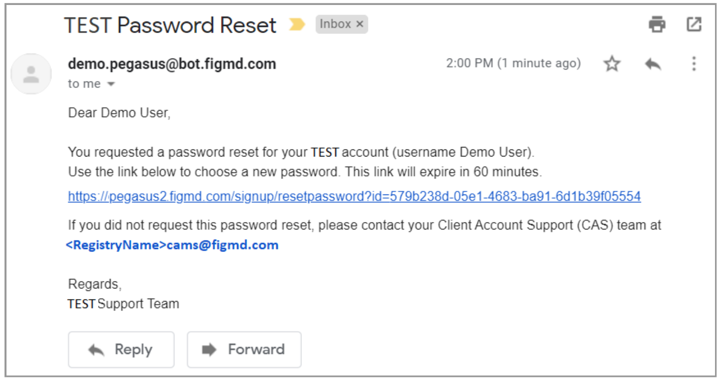
For any further assistance, please contact your Client Account Support (CAS) team at **<RegistryName>cams@figmd.com**.

Regards,
TEST Support Team.

Forgot Password

Register to the FIGmd Sign-Up portal using the link provided.

Step 1: Access Link	Step 2: Forgot Password	Optional Step
		
Click **FORGOT PASSWORD**, if you forgot your password.	• Provide username and email address. • Click **SUBMIT**.	Click **RESEND EMAIL**, if you have not received the email.

<table>
<tr>
<th>Step 3: Password Reset Link</th>
<th>Step 4: Set Password</th>
<th>Step 5: Access Login Page</th>
</tr>
<tr>
<td>
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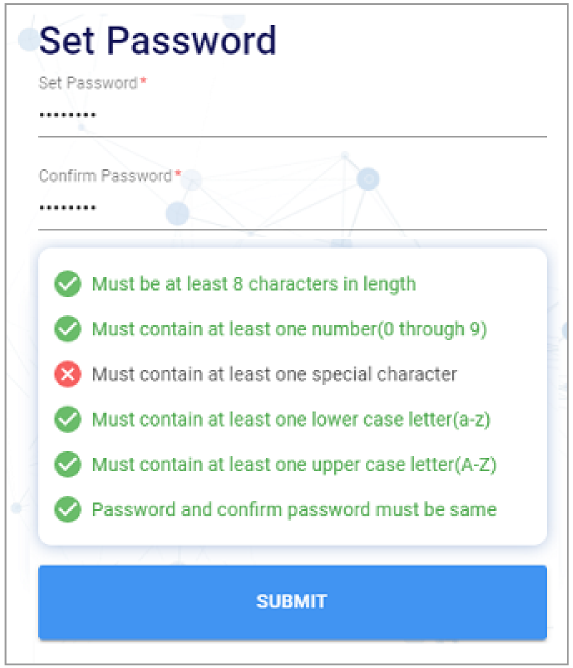
<td>
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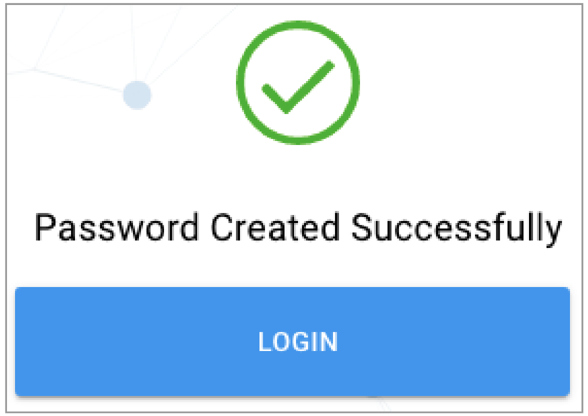
<td>
</td>
</tr>
<tr>
<td>Click on the link provided in the email to set our password.</td>
<td>Set your password as per the password criteria.
Click SUBMIT.
Note:
Green checkmark indicates that the password criteria has been met.
Red X indicates that the password criteria has not been met.</td>
<td>Click LOGIN to access the login page.</td>
</tr>
</table>