My Account

Quick Start Guide - Version 1.1

Notice of Copyright, Confidentiality and Disclaimer

Disclaimer

FIGmd provides all material and information in this document on an "as-is" basis and disclaims all warranties and conditions with regard to this information, including all implied warranties and conditions of merchantability, fitness for any particular purpose, title and non-infringement. The document and its contents are subject to change without notice and, as such, do not imply responsibility on the part of FIGmd for any inaccuracy contained herein. In no event and under no circumstances can FIGmd accept responsibility for errors or omissions or be held liable for any kind of damage resulting from the use, performance, connection with or the application of the information contained in this document.

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.

Access to My Account page

Use the link in the enrollment email to access the **My Account** dashboard

Login

Option for administrator to log into **My Account**

My Account Page

View **My Account** Page

My Account

Select/Add Organization

Option to select or add organization

Organization

View/Update organization, contact and TIN details

Users

Option to view the users within the organization

Clinicians

View/Update clinician details

Locations

View/Update location details

Technical

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

Subscribed Programs

View the details of the Subscribed Program

Available Programs

View and enroll the qualified clinicians to the Available Programs

Introduction	
Pegasus 2.0 has a new feature, '**My Account**' serves as a centralized account management interface for participating entities. This helps administrative users to manage their end-to-end participation requirements such as edit organization's demographic, contact, and TIN information; add, edit, and delete clinicians, locations, and users; and create new practices/organizations by administrative users who manage multiple practices/organizations. Moreover, if an organization is a multi-specialty practice, different providers within the same organization can participate in various registries based on their specialty. Administrative users can enroll their organization into multiple registries and centrally manage numerous registry participations with ease. This feature is customizable at the registry level viz. a registry can choose to disable this feature if it does not want FIGmd to offer other registries with different specialties to their practices. Some of the salient features of 'My Account' are that users do have to re-enter their organizational-level information for every new enrolment and users can centrally manage multiple registry participations, renewals, and additions of new clinicians.	**Contact Us** **E-mail** <Registry Name>cams@figmd.com

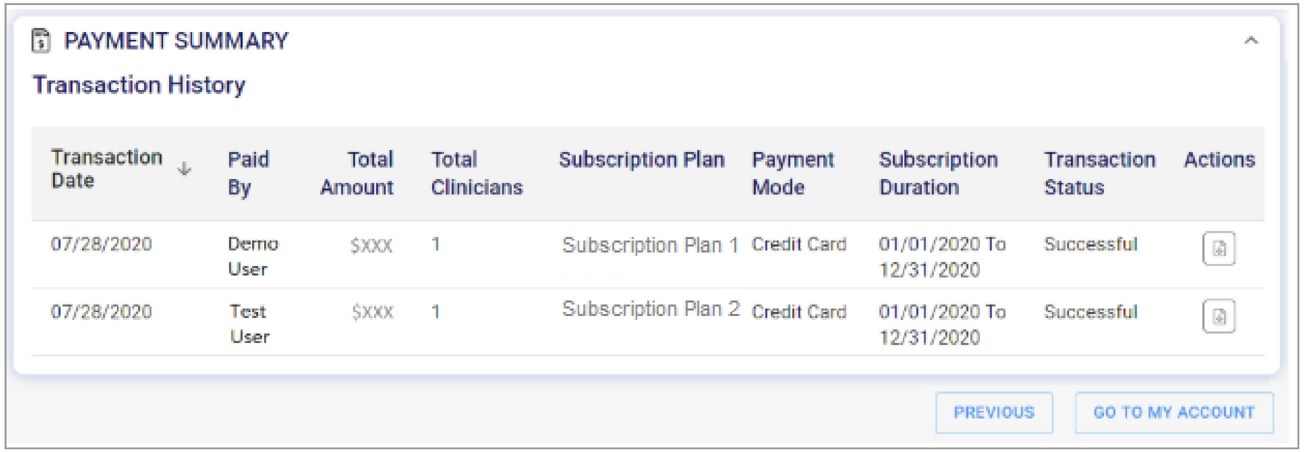
Document Conventions			
	Toggle to view or hide the password in the password field.		Provides additional details about the respective field.
*	Represents mandatory fields		Enables to search for a record.
	Expand to view the information in the milestone.		Collapse to close the information in the milestone.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

Access/Login - My Account Page

After a successful sign up, you can access **My Account** in 2 ways.

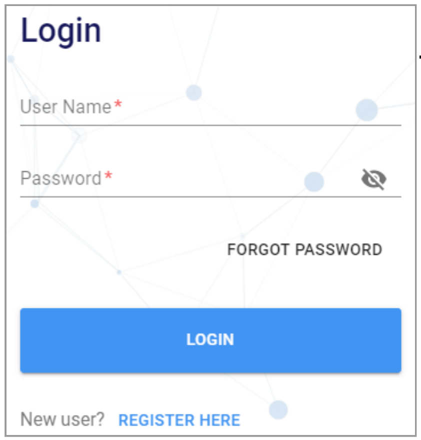
A. Use the **Go To My Account** option displayed on the Sign up portal dashboard.

1. Click **Go To My Account** on the Sign Up dashboard.
   You are navigated to the My Account page



B. Login to **My Account** using the link provided by your CAM.

1. Click on the link provided by the CAM to open Login page
2. Enter your credentials[1].
3. Click **LOGIN**.
   Successful login navigates to the My Account page.



.

Note:

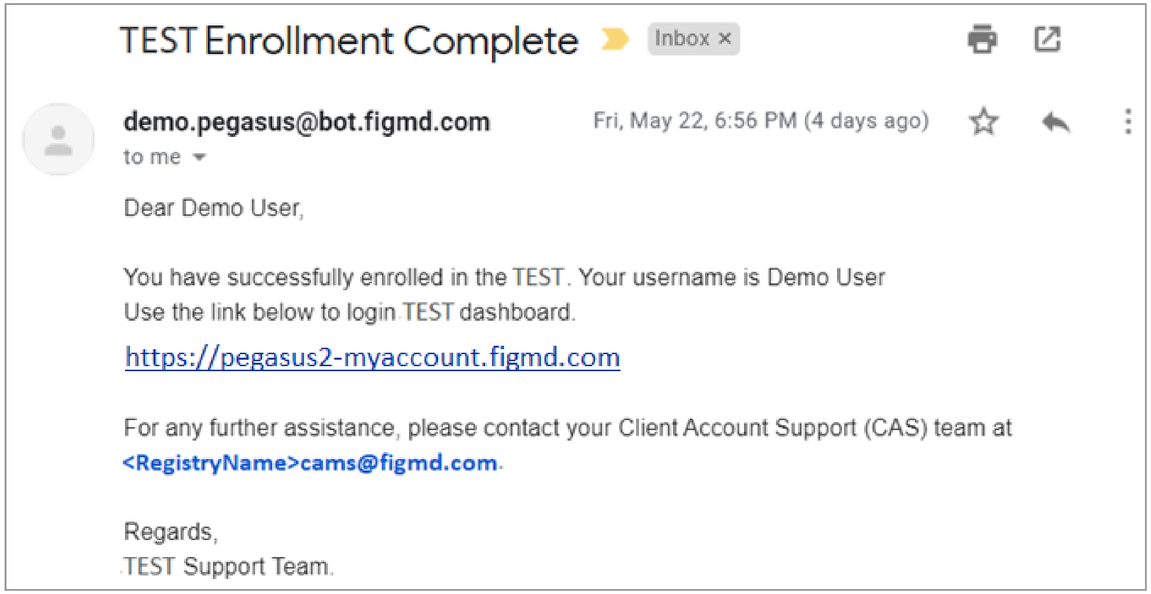
- Toggle the eye icon in the password field to view or hide the password

[1] *Log into **My Account** using the same credentials used while registering with the FIGmd Payer Sign Up portal.*

Access to Pegasus - My Account Page

After a successful sign up, two emails are received at your registered email address.

- Payment Successful
- Enrollment Completion
  Enrollment email contains your username and a link to access the **My Account** page of the Pegasus dashboard.



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-myaccount.figmd.com

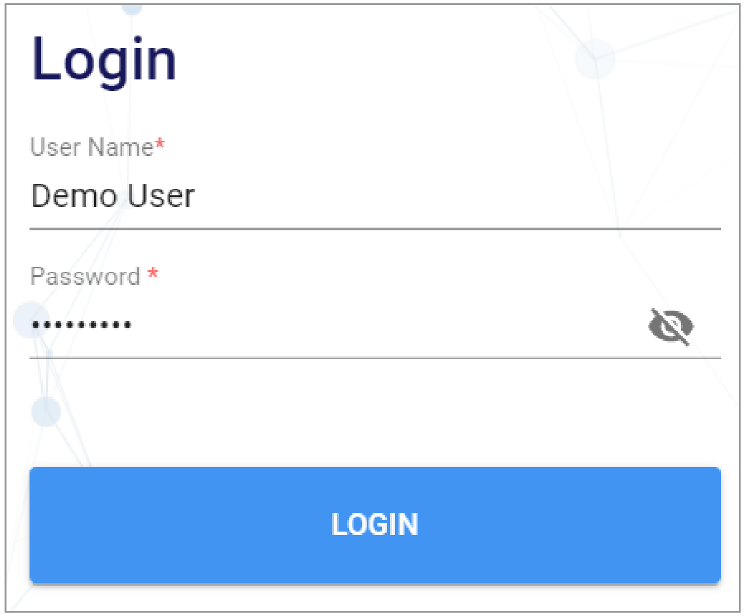
For any further assistance, please contact your Client Account Support (CAS) team at <RegistryName>cams@figmd.com.

Regards,
TEST Support Team.

- Click on the link provided in the email.
  Opens the Login page.

Login

Log into **My Account** using the same credentials used while registering with the Sign Up portal.



1. Enter your credentials.
2. Click **LOGIN**.
   Successful login navigates to the [My Account](#) page.

Note:

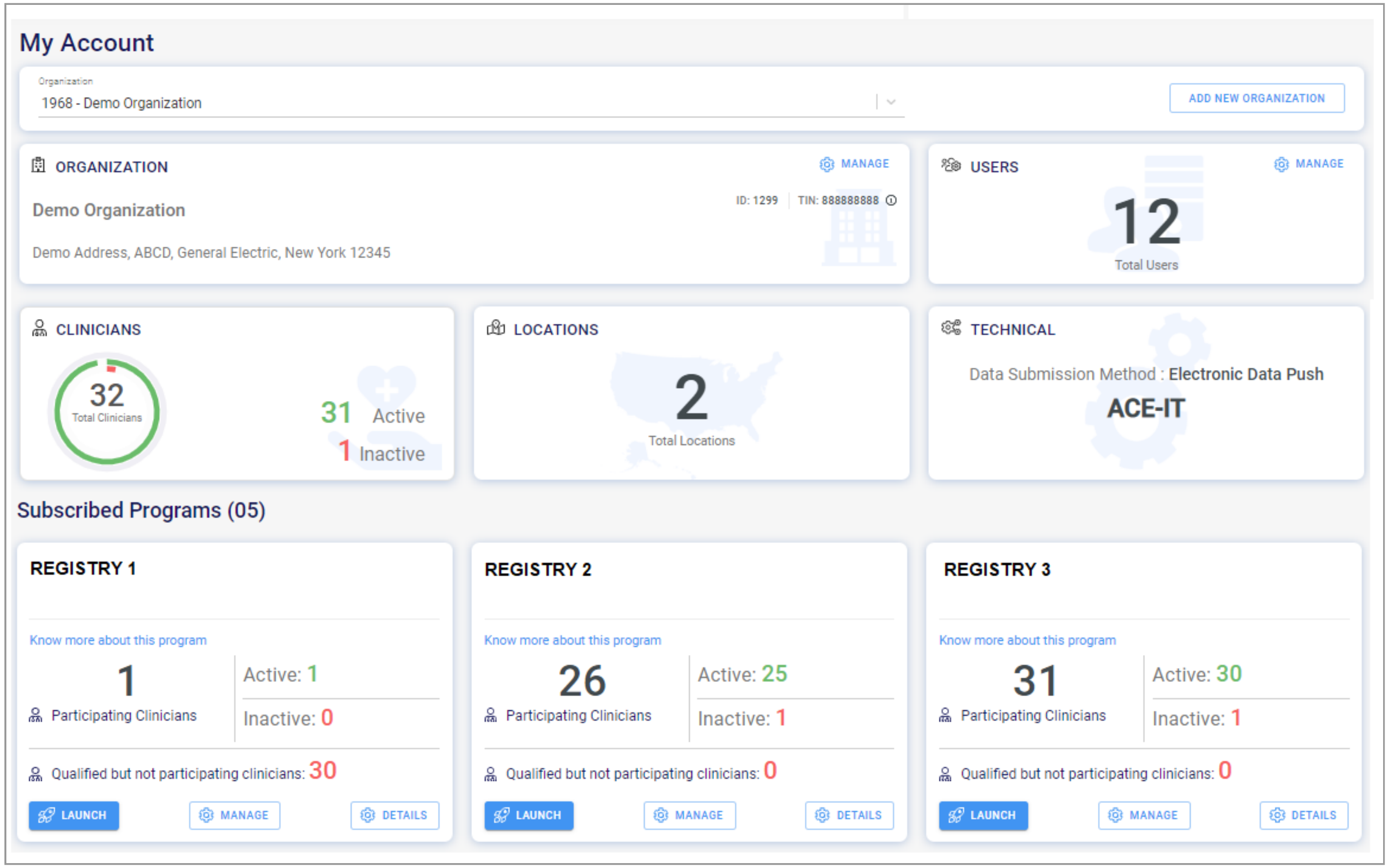
- Toggle the eye icon in the password field to view or hide the password.

My Account Page

Select/Add Organization	Organization	Users	Clinicians	Locations	Technical	Subscribed Programs	Available Programs

My Account Page

My Account is an administrative module available only to Practice Admins or Multi-practice Admins, to manage organization related information for specific or multiple registries from a central page.



My Account page displays the following tiles:

- Select/Add Organization
- Organization
- Users
- Clinicians
- Locations
- Technical
- Subscribed Programs
- Available Programs (if applicable)

Note:
As the Sign Up portal is locked on completion, the **My Account** module provides a means to add or update required information in each milestone of the Sign Up portal.

Select/Add Organization

Select/Add Organization	Organization	Users	Clinicians	Locations	Technical	Subscribed Programs	Available Programs

Select/Add Organization

To manage the account of an organization, the Practice Admin or Multi-practice Admin can select it from the drop-down. If the required organization is not available, they have the authority to create a new one.

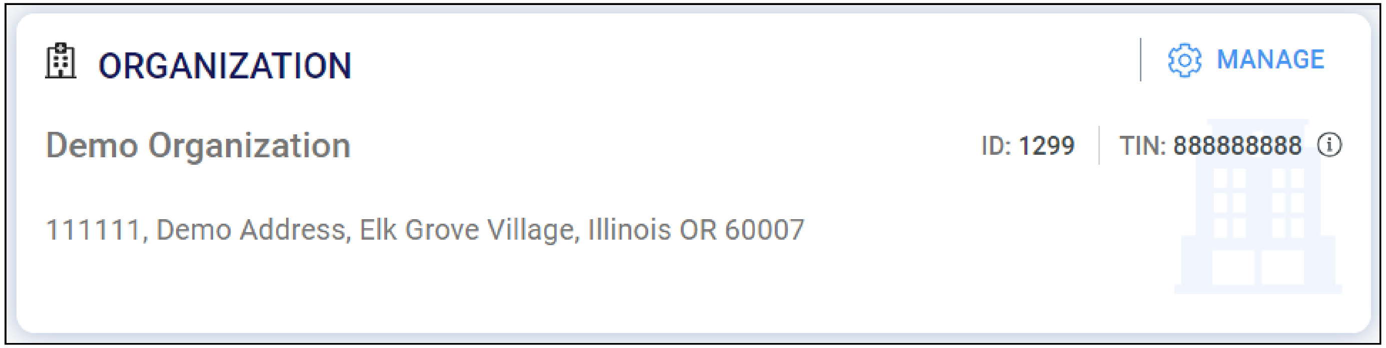
Select Existing Organization	Add New Organization
• Select the organization from the dropdown. Displays the data applicable to the organization.	• Click **ADD NEW ORGANIZATION**. Navigates to the registration page of the Sign Up portal to register the new organization.

Organization

Select/Add Organization	Organization	Users	Clinicians	Locations	Technical	Subscribed Programs	Available Programs

Organization

Organization tile displays the details of your organization fetched from the Sign Up Portal.



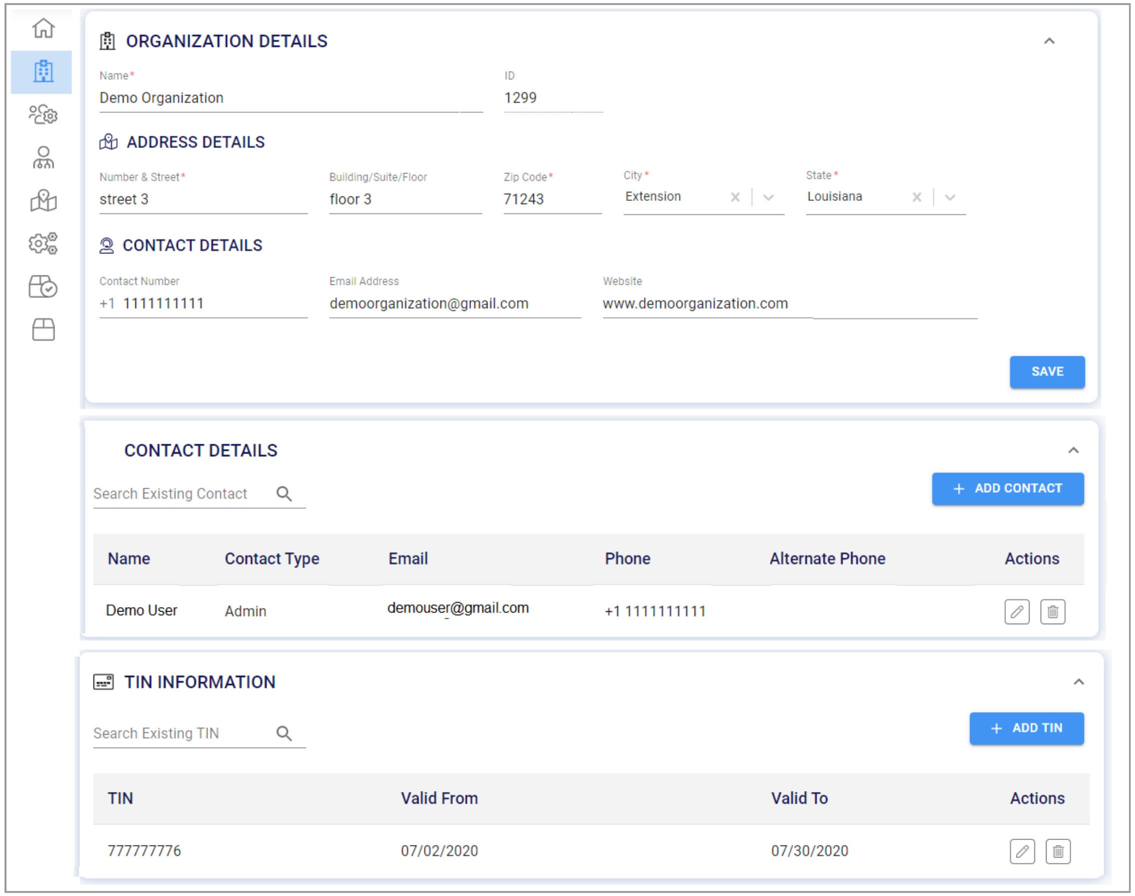
If you wish to make any updates or add new details to the displayed information,

- Click **MANAGE**.
  Opens the [Organization Details](#) page.

Note:
Organization ID and TIN are auto-populated.

Organization Details

Organization Details page displays three separate sections to capture the demographic information about the organization, contact details, and the TIN[2]s under which this organization is billing. This information is fetched from the Sign Up portal and displayed. However, you can add/edit or delete existing details as applicable



Organization Details

- Make necessary edits.
- Click **Save**.

Contact Details

- Click **+ ADD CONTACT** to add new contact details.
- Edit or Delete existing details.

TIN Information

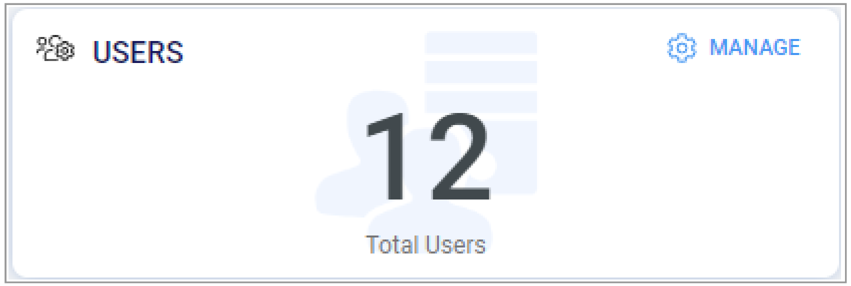
- Edit or Delete existing details.
- Click **+ ADD TIN** to add a new TIN record.

Note: For a detailed explanation of this feature, please refer to the Sign Up Portal manual.

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

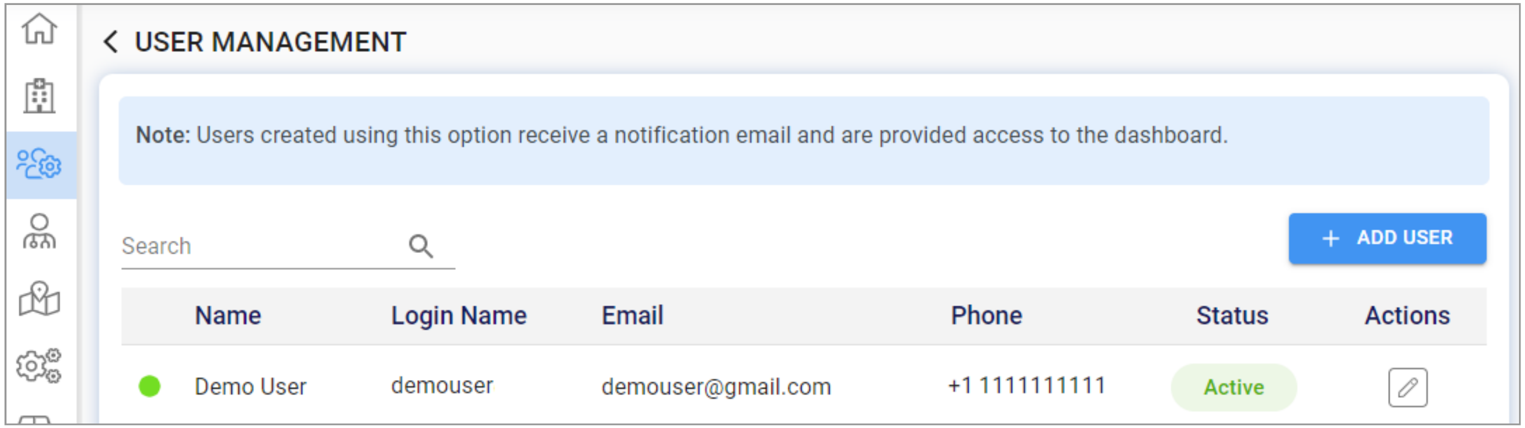
Users

[Select/Add Organization](#)	[Organization](#)	Users	[Clinicians](#)	[Locations](#)	[Technical](#)	[Subscribed Programs](#)	[Available Programs](#)

Users
Users tile displays the number of users within the selected organization, having access to the dashboard. These records are fetched from the Sign Up Portal.

If you wish to make any updates or add new users to the displayed information, ● Click **MANAGE**. Opens the User Management page.

User Management

User Management page displays a list of users associated with the organization. It enables you to add new users and edit existing user details.
(**Optional**) Search Users by typing the search criteria in the search field.



Add User

- Click **+ ADD USER** to add a new user record.

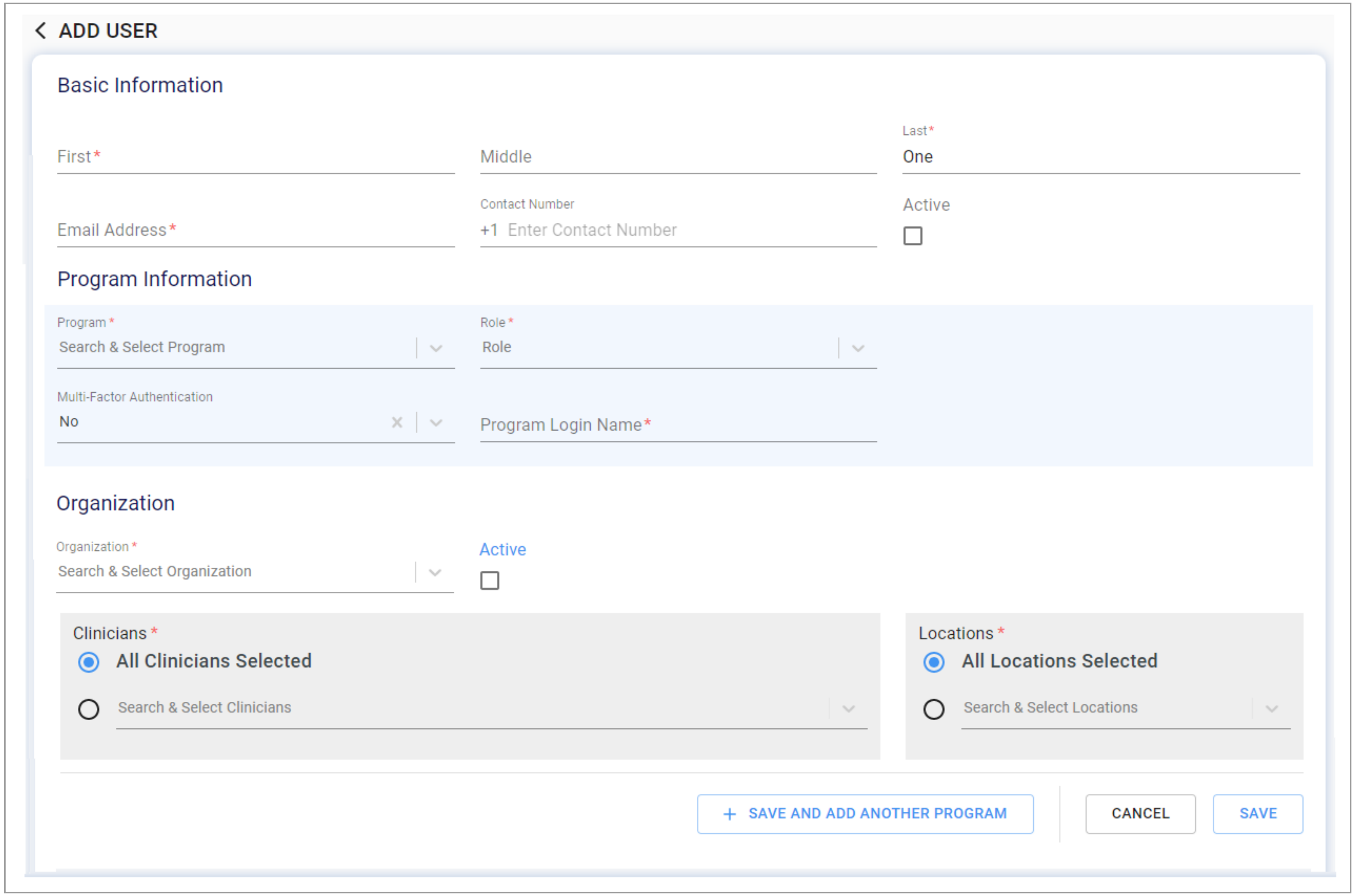
Note: Users created using this option are provided access to the dashboard.

Edit or Delete record

- Edit or Delete existing records.

Add User

Add User page captures basic details of the user, the program which the user will access and associated clinicians/locations.



Basic Information
Captures the name, email and contact number and allows to set the status of the user (active or inactive).

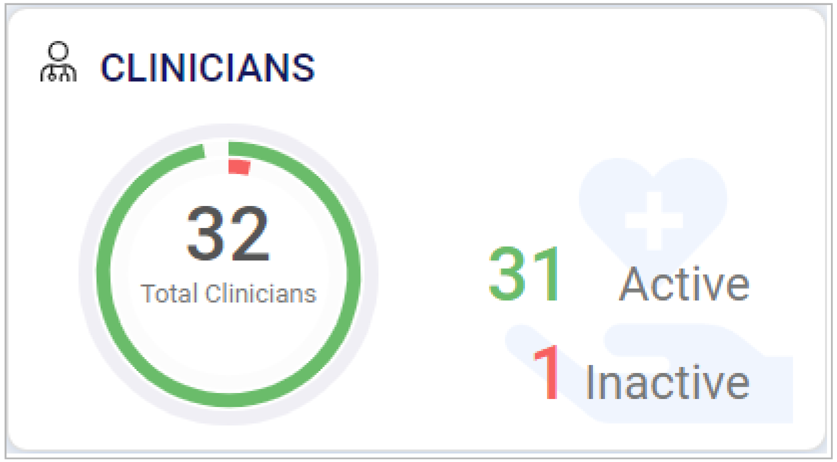
Program Information
Captures information about
- the program the user would have access to,
- role of the user (Clinician or Practice Admin),
- username to login to the program.

Organization
Captures the
- Active or inactive status of the organization
- clinicians and locations associated with the user.

Note:
- Organization is auto-selected.
- Select specific associated clinicians/locations by typing in the relevant search criteria.

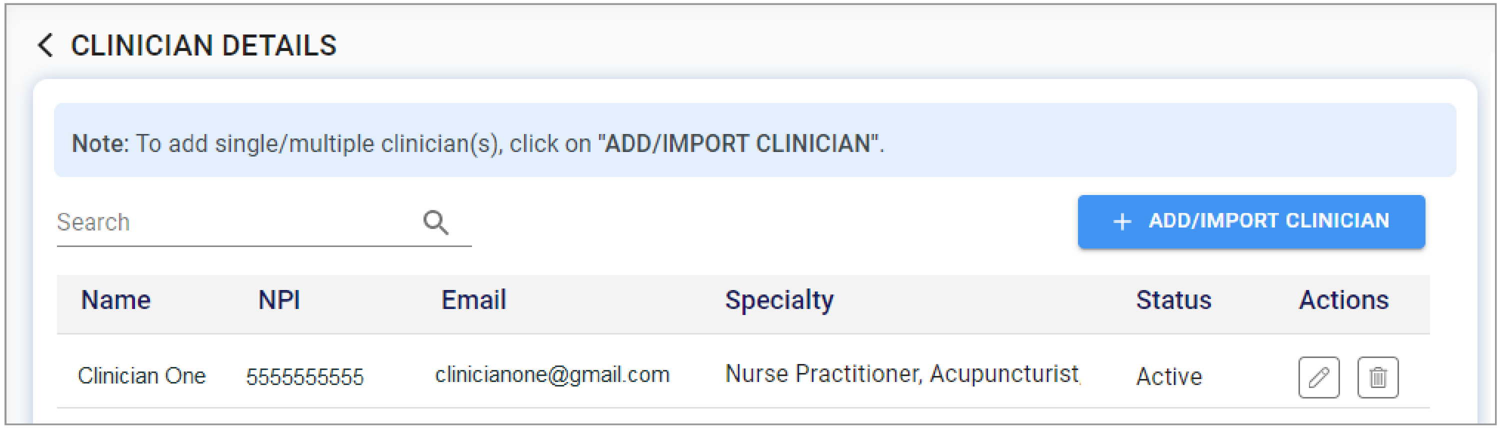
Clinicians

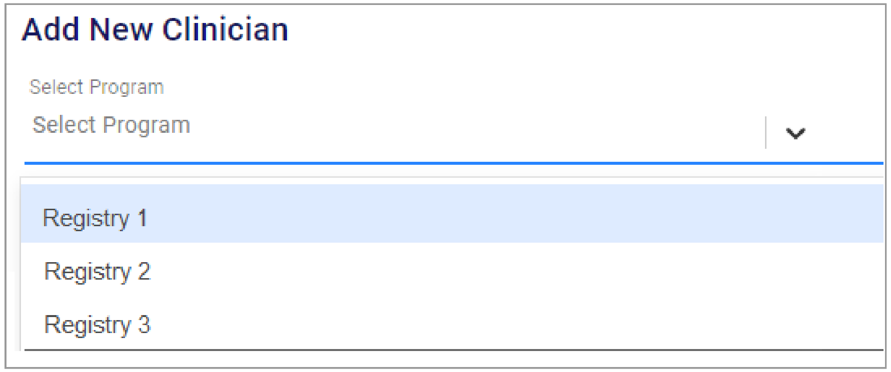
Select/Add Organization	Organization	Users	Clinicians	Locations	Technical	Subscribed Programs	Available Programs

Clinicians
Clinicians tile displays the total number of active and inactive clinicians for the selected organization. These records are fetched from the Sign Up Portal.

If you wish to view or make any updates to the displayed information, ● Click anywhere on the **CLINICIANS** tile. Opens the [Clinicians Details](#) page.

Clinicians Details

Clinician Details page displays details of the clinicians associated with the organization. It enables to add new clinicians and edit or delete existing clinician details.
(**Optional**) Search Clinician by typing the search criteria in the search field.





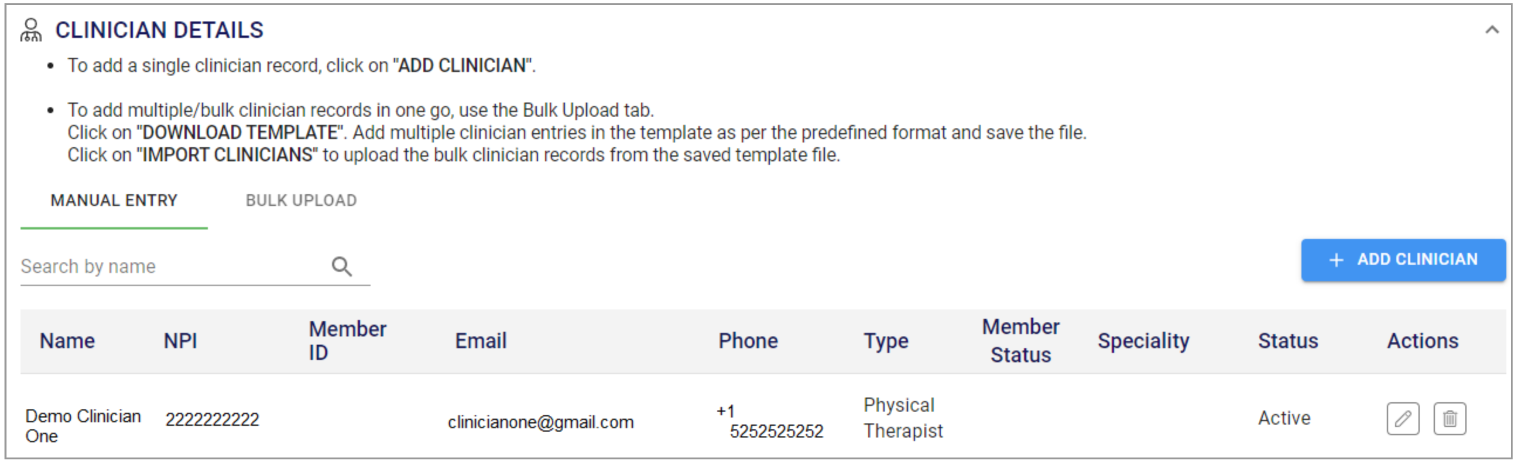
Add/Import Clinician

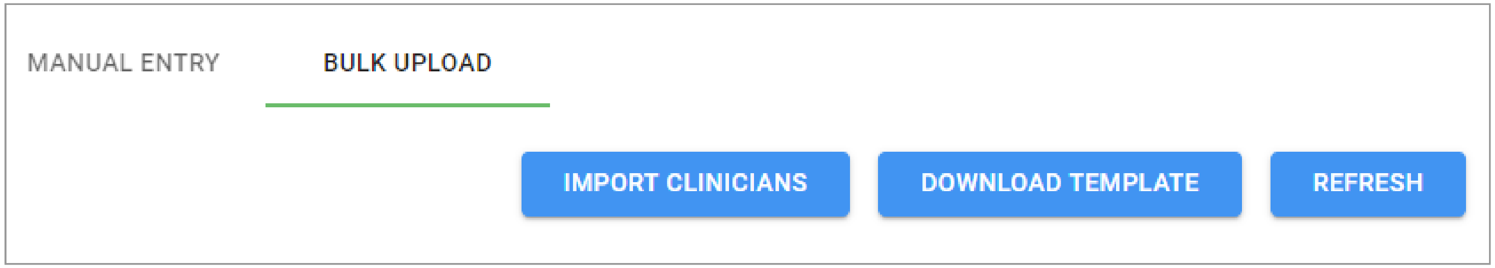
- Click **ADD/IMPORT CLINICIAN**
- Select Programs from the drop-down.
  You are directed to the Clinician milestone (Sign-Up portal) of the organization.

Clinicians Details

New clinicians can be added individually or can be imported in bulk:

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





Manual Entry (+ Add Clinician)

- Select **MANUAL ENTRY** tab (is default selection)
- Click **+ ADD CLINICIAN** to add an individual clinician record.

Bulk Upload (Import Clinicians)

- Select the **BULK UPLOAD** tab.
- Click **DOWNLOAD TEMPLATE**.
- Enter the clinician details in the template(CSV format) file and save.
- Click **IMPORT CLINICIANS**.

Note: For a detailed explanation of this feature, please refer to the Sign Up Portal manual.

Locations

Select/Add Organization	Organization	Users	Clinicians	Locations	Technical	Subscribed Programs	Available Programs

Locations
Locations tile displays the total number of locations associated with the selected organization. If there are no locations associated with the practice, the displayed count is 0.

If you wish to view or make any updates to the displayed information, ● Click anywhere on the **LOCATIONS** tile. Opens the Location Details page. **Note**: Use this option only if applicable.

Locations Details

Location Details page displays details of the locations associated with the organization. It enables adding new locations, and editing or deleting existing location details.
(**Optional**) Search for a location by typing the search criteria in the search field.

Add Location

- Click **+ ADD LOCATION** to add a new location record.

Edit or Delete record

- Edit or Delete existing records.

Note: For a detailed explanation of this feature, please refer to the Sign Up Portal manual.

Technical

Select/Add Organization	Organization	Users	Clinicians	Locations	Technical	Subscribed Programs	Available Programs

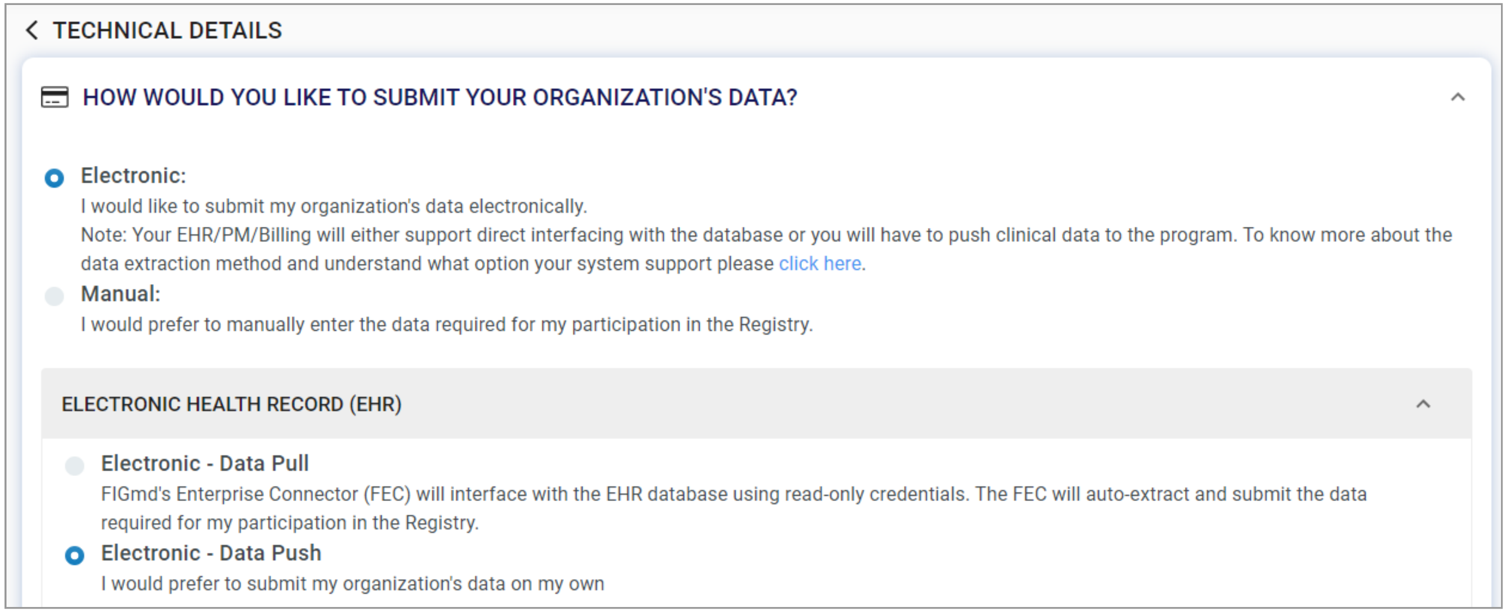
Technical
Technical tile displays the information about the data submission method selected by your organization. These records are fetched from the Sign Up Portal.

If you wish to view or make any updates to the technical information provided during Sign Up, ● Click anywhere on the **TECHNICAL** tile. Opens the Technical Details page.

Technical Details

Technical Details page displays the information about the data submission method selected by your organization during Sign Up.
There are two sections to the **Technical Survey**:

- Method to submit organization data
- Authorize program participation



Method to submit organization data

- **Electronic Or Manual**
- **Electronic Method involves:**
  - **Electronic Data / Pull Push**
    - Electronic Data Pull - FIGmd Enterprise Connector is installed and interfaces with the practice **EHR/PM/LIS/APIS** system
    - Electronic Data Push - Submit data in predefined formats.
- **Manual Data Entry**
  Manually enter data using a webtool.

If you wish, you can update the data submission method.
Note: For a detailed explanation of this feature, please refer to the Sign Up Portal manual.

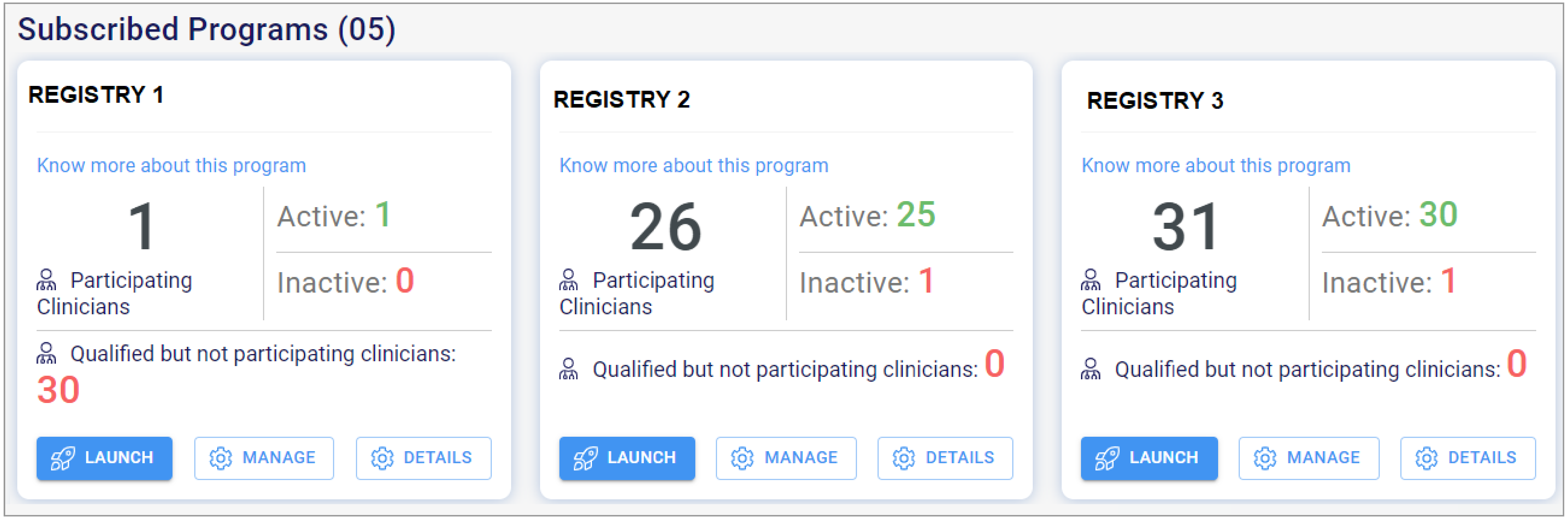
Subscribed Programs

Select/Add Organization	Organization	Users	Clinicians	Locations	Technical	Subscribed Programs	Available Programs

Subscribed Programs

Subscribed Programs include registry tiles corresponding to the registries which the Practice Admin or Multi-practice Admin have enrolled for.
Program tile displays total number of

- Qualified clinicians participating in the program (Active and Inactive)
- Qualified clinicians but not subscribed to the program



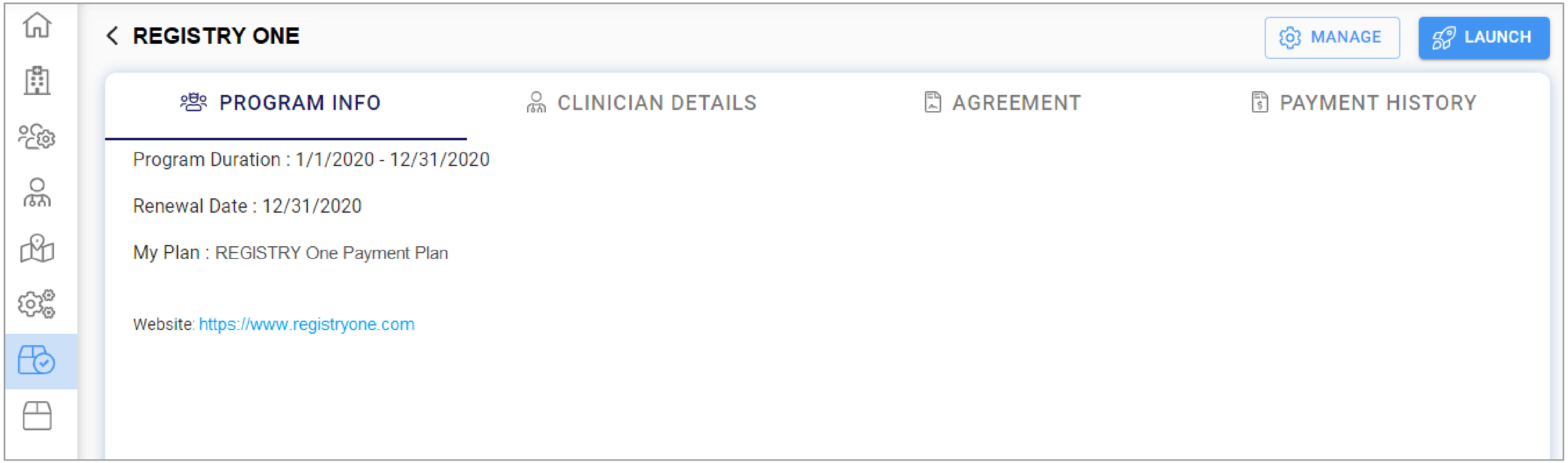
Each program tile has three options:

- Launch (Opens the Pegasus Dashboard of the respective registry)
- Manage (Opens the Sign-Up portal of the subscribed registry)
- Details (Opens the respective registry page to update the details of the subscribed program)

Note:
Know more about this program navigates to the respective registry website.

Details

Registry page displays four milestones corresponding to the information captured during the Sign Up process in the read-only mode.



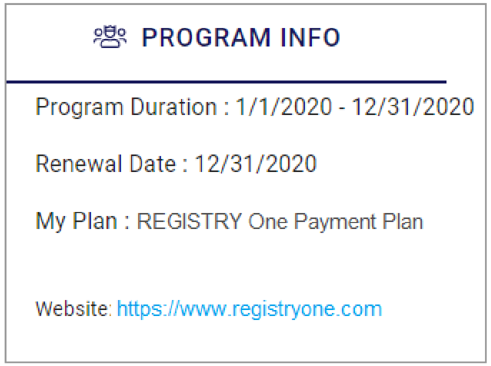
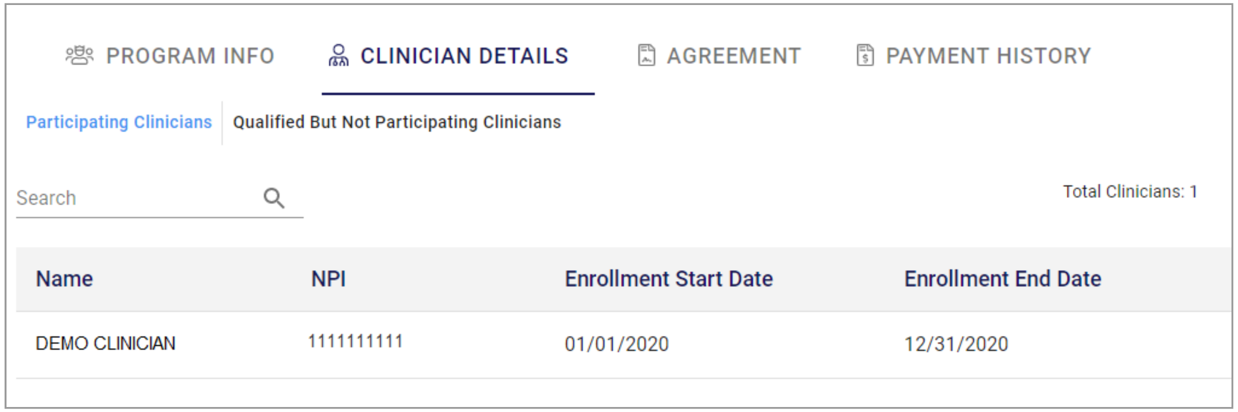
Page displays

Two buttons

- Manage - (Opens the sign up portal in Edit mode.)
  Use this option if you wish to make any updates to the displayed information in any of the milestones.
- Launch - (Opens the Pegasus Dashboard of the respective registry)

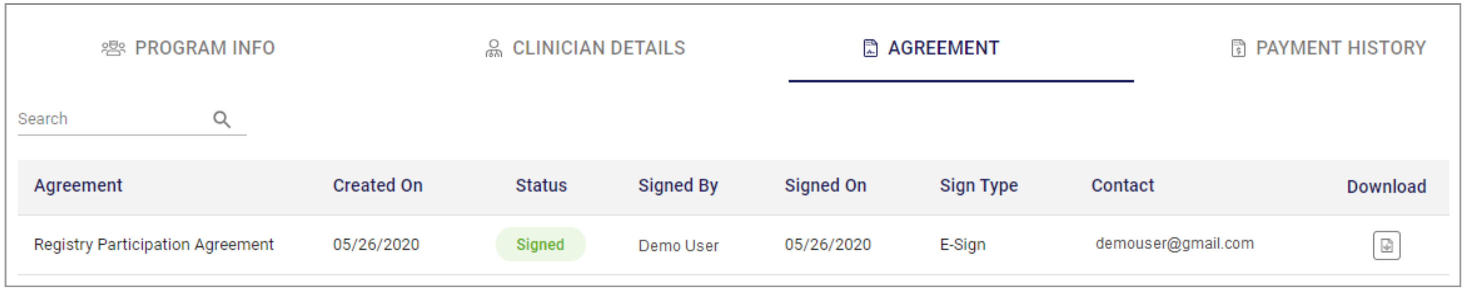
Four Tabs

- Program Info
- Clinician Details
- Agreement
- Payment History

Program Info The tab displays the duration of the subscribed program, its renewal date, plan details and a link to the registry website.	
Clinicians Details The tab displays the list of clinicians associated with the registry. These are further classified under two tabs: • Participating Clinicians - (Subscribed to the program) • Qualified But Not Participating Clinicians - (Qualified but not subscribed to the program) Use the **Manage** option to enroll the qualified clinicians in the program.	

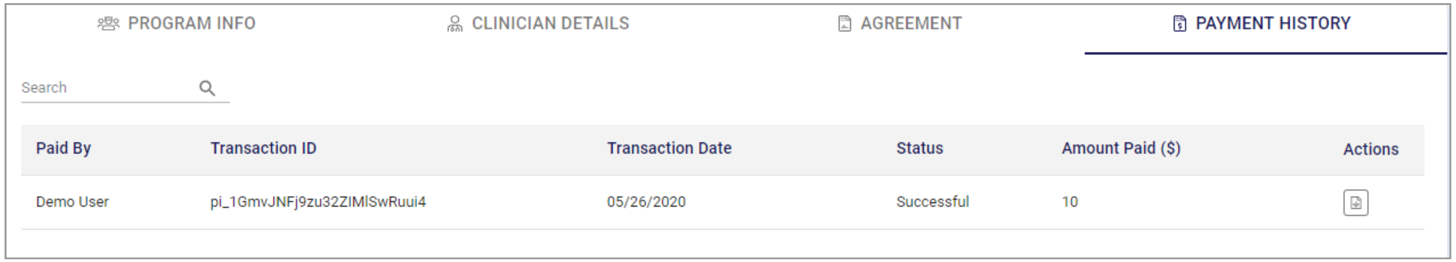
Agreement

- The tab displays the details of the signed agreement.
- Download the signed agreement for your reference.



Payment History

- The tab displays the details of the payment for the subscribed plan.
- Download the PDF copy of the invoice.

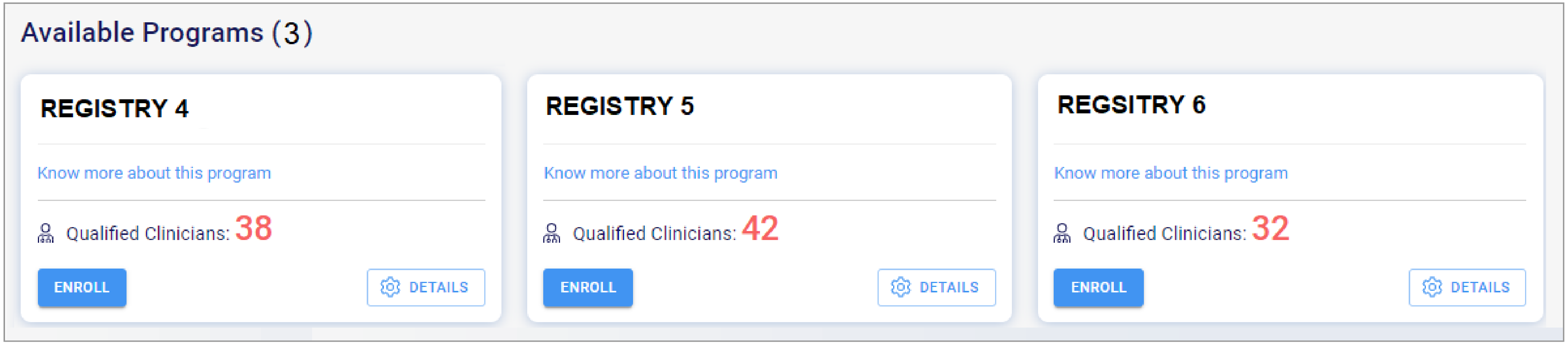


Available Programs

Select/Add Organization	Organization	Users	Clinicians	Locations	Technical	Subscribed Programs	Available Programs

Available Programs

Available Programs page displays the registry tiles with the total number of clinicians qualified for the respective programs based on matching taxonomy. Practice Admin or Multi-practice Admins can enroll the qualified clinicians to these programs.
Note: This feature is configurable as per registry specification.

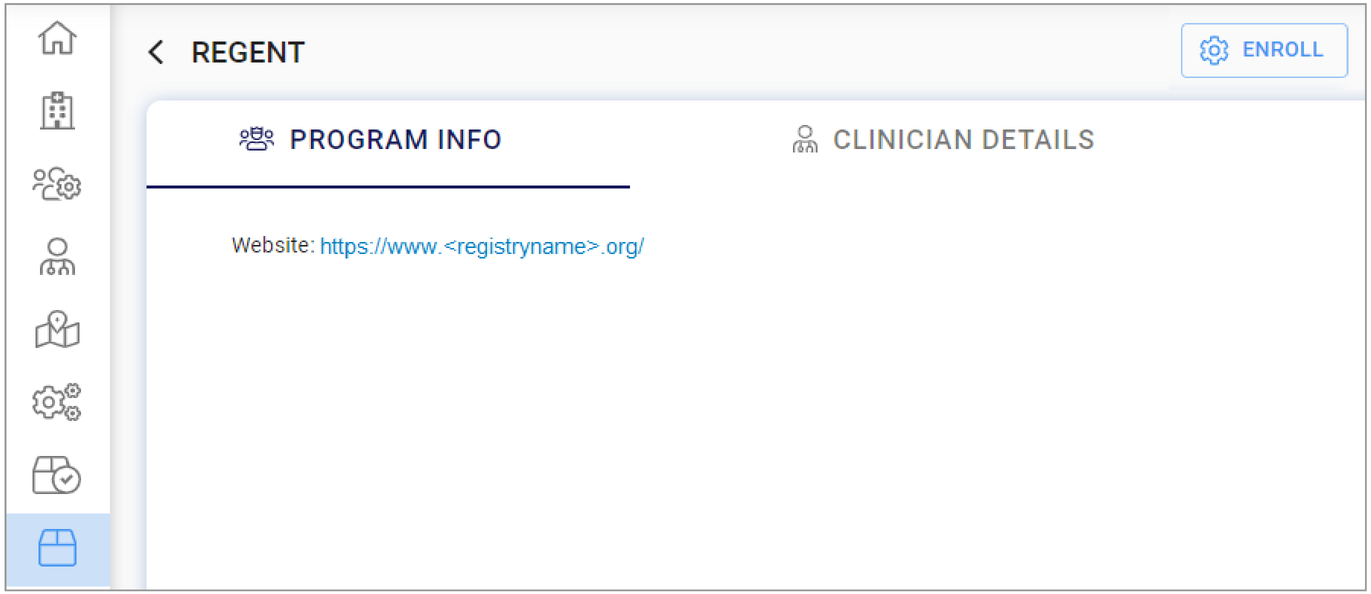


Each tile displays

- Total number of clinicians qualified for the respective program
- Two Buttons
  - Enroll (Opens the sign up portal to initiate enrollment)
  - Details (Opens the registry page to view the details of the available program)

Details

Registry page displays information about the registry and details of the qualified clinicians in the read-only mode.



Page displays

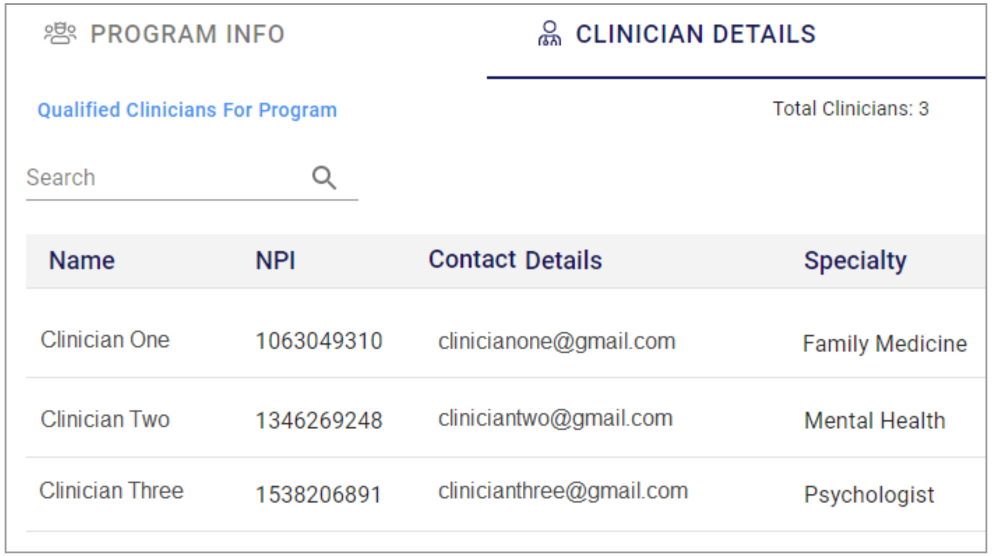
Button

- Enroll - (Opens the sign up portal to enroll to the respective registry)
  Use this option if you wish to enroll in the registry.

Two Tabs

- Program Info
- Clinician Details

<table>
<tr><th>Program Info</th><th>Clinician Details</th></tr>
<tr><td>Program Info tab displays a link to the registry website.</td><td>Clinicians Details tab displays the list of clinicians qualified for the program.
• Use the Enroll option to enroll the qualified clinicians in the program.</td></tr>
<tr><td>


</td><td>


</td></tr>
</table>