

Shared Health® Clinical Xchange®

Clinician Registration



Table of Contents

Information Needed to Register.....	3
How to Begin Registration.....	4
Clinical User Registration.....	6
Prescribing Clinician Registration.....	7
Clinical Staff (Non-Prescribing) Registration.....	16
Entity Authority Registration.....	23
User Management Console.....	32

Information Needed to Register:

Physicians, Nurse Practitioners, Physician Assistants, and other Mid-level Practitioners:

- NPI #
- DEA #
- DEA Expiration Date
- State License
- State License Expiration Date
- Billing TIN #s

Clinical Staff and/or Administrative Staff who do not have their own NPI #:

- All NPI #s for facilities, and providers for which you are associated with
- Billing TIN #s

How to Begin Registration:

Prior to 10/1/2008, go to: <http://www.sharedhealth.org>

Note: Beginning 10/1/2008, you may go to: <http://www.sharedhealth.com>

Step 1: Click the Register link.

The screenshot shows the Shared Health website interface. At the top right, there are links for "REGISTER" and "CLICK HERE TO SIGN IN". Below these is a "Products & Services" dropdown menu. A navigation bar contains links for "Company", "Solutions", "Success", "ARRA", "Resources", and "Contact Us". The main banner features silhouettes of healthcare professionals and the text "Helping doctors transform care and improve the lives of their patients" with a "Click to learn how" link. Below the banner are three columns of content: "What We Do" (describing the company's role in the health care IT industry), "Industry Buzz" (listing recent news articles), and "What you need to know" (a numbered list of key topics). A callout box from the text above points to the "REGISTER" link in the top right corner.

Step 2: Click the Clinical User Registration link.

SharedHealth®
Transforming Care

REGISTER •
FORGOT PASSWORD •
FORGOT ID •
LOGIN •

Company Solutions Success

HOME » ACCOUNT MANAGEMENT » REGISTRATION

Account Registration

Choose your registration type

By registering with Shared Health®, you have access to data about you or your patients that can be the first step to improving care. Select the type of registration that applies to you below:

Consumer Registration

As a consumer, you can access your own Clinical Health Record, or CHR, as well as those belonging to your dependents.

Clinical User Registration

As a clinician or supporting staff, you have access to claims data, pharmacy data, lab data, and more. The CHR links you to one complete, up-to-date network of medical information.

Step 2: Click the Clinical User Registration link.

Clinical User Registration:

Step 1: Click the Start Registration button.

HOME » ACCOUNT MANAGEMENT » REGISTRATION » CLINICAL USER

Clinical User Registration

You will need to complete the following steps in order to register and access the Clinical Health Record.

Step 1: Enter Your National Provider Identifier

Not all individuals who register will have a National Provider Identifier (NPI), but if you do, you will be required to enter it here. If you have forgotten your NPI, there is a search tool to help you find it.

Step 2: Complete Your Account Information

Complete the registration form and create your user ID and password.

Step 3: Accept the Terms and Conditions of Use

Read and accept our terms and conditions. Your account is created after this step, and you will be logged in.

Step 4: NPI Associations

In this step you will request associations to one or more NPIs. These include both institutional/facility and professional/physician NPIs with which you wish to be associated.

If you are a treating clinician and do not yet have an NPI, please register with the [National Plan and Provider Enumeration System \(NPPES\)](#) and return to register with Shared Health once you have your NPI.

Each NPI (facility or provider) will have a designated Entity Authority (EA). The EA will be responsible for managing and authorizing access for all of the users of the Shared Health application for that NPI. If you are the Entity Authority for an NPI, you will have additional steps after user registration to request that authority.

Step 1: Click Start Registration button.

Start Registration

Scenario 1: Prescribing Clinician is registering

Step 1: Click the radio button for the Treating Clinician

Step 2: Enter the NPI #.

Note: If the Clinician does not know their NPI #, they may click the Search for Your NPI button.

Step 3: Click the Search button.

HOME

Clinical User Registration

Step 1 of 4: Enter Your National Provider Identifier

Although the Shared Health CHR™ can be accessed by various types of clinical staff, certain users must register using their individual National Provider Identifier (NPI).

Choose one of the two options below:

- Treating Clinicians** (NPI required: Includes Physicians, Nurse Practitioners, PAs and other Mid-level Practitioners)
- Clinical and Administrative Staff** (NPI not required)

If you are a health care provider who bills for services and claims are filed under your name, you probably have an NPI, and you should use this for Shared Health registration. If you do not yet have an NPI, please register with the [National Plan and Provider Enumeration System \(NPPES\)](#) and return to register with Shared Health once you have your NPI. If you do not register with your individual NPI, we will have difficulty identifying you in the system, and some application functionality may not be available to you.

All Clinical staff who do not have a National Provider Identifier and all Administrative staff should choose this option.

NATIONAL PROVIDER IDENTIFIER (NPI) :

Step 1: Click Treating Clinicians radio button.

Step 2: Enter NPI #.

Search for Your NPI #.

Step 3: Click Next button.

The Clinician information is pre-populated on the top portion of the Account Creation Form.

Clinical User Registration

Step 2 of 4: Complete your Account Information
Please complete the form below. Required fields are marked with an asterisk (*).
If you have any problems completing this form, please contact us at 1-888-283-6691. The pre-populated, uneditable data on this page comes from the NPI database maintained by NPPES. If you see any inaccuracies in this data, please contact NPPES at 1-800-465-3203 to make changes, or visit the [NPPES website](#).

Enter your Individual Information:

FIRST NAME:	<input type="text" value="Jane"/>	*
MIDDLE NAME:	<input type="text"/>	
LAST NAME:	<input type="text" value="Doe"/>	*
SUFFIX:	<input type="text"/>	
GENDER:	<input type="text"/>	*
PRACTICE ADDRESS LINE 1:	<input type="text" value="401 Chestnut Street"/>	*
PRACTICE ADDRESS LINE 2:	<input type="text"/>	
PRACTICE CITY:	<input type="text" value="Chattanooga"/>	*
STATE:	<input type="text" value="TN"/>	*
ZIP:	<input type="text" value="37402"/> <input type="text" value="5555"/>	
TELEPHONE NUMBER:	(<input type="text" value="423"/>) <input type="text" value="555"/> <input type="text" value="5555"/> * ext: <input type="text"/>	
FAX NUMBER:	(<input type="text" value="423"/>) <input type="text" value="555"/> <input type="text" value="5551"/> *	
UPIN:	<input type="text" value="D12345"/>	
ENTER ONE OR MORE BILLING TAX ID(s):	<input type="text" value="555-55-5555"/> * (+ Add More)	

The middle section of the Account Creation Form has several areas that will need to be completed, such as:

- Billing TIN # - Click (+) Add More link to add additional Billing TIN #s
- Email Address
- Date of Birth
- SSN (Optional Field)
- Choose if Prescribing or Non-Prescribing Clinician
- State License Exp. Date
- DEA #
- DEA Extension (if applicable)
- DEA Schedules
- DEA Exp. Date
- User ID
- Password

Note: The asterisk (*) indicates a required field.

E-MAIL: JDoe@mypractice.com *

VERIFY E-MAIL: JDoe@mypractice.com *

DATE OF BIRTH: MAY 1 1960 *

SOCIAL SEC. NUMBER: []

CHOOSE ONE OF THE FOLLOWING OPTIONS: NON-PRESCRIBING PRESCRIBING *

Prescribing Information:

STATE LICENSE NUMBER: JD1234567 *

ISSUING STATE: [] *

STATE LICENSE EXP. DATE: JAN 1 2011 *

DEA NUMBER: JD12345 *

DEA EXTENSION: []

DEA SCHEDULES: II III IV V *

DEA EXP. DATE: JAN 1 2011 *

Create your User ID & Password:

Please choose a user ID and password for your account.

USER ID: JDoe * (Must be 3-15 characters long and may only contain letters, numbers, and the underscore(_) character, and start with a letter or number.)

SELECT PASSWORD: [] * (Must be at least 8 characters long, contain only letters, numbers or special characters, and must contain at least 1 letter and 1 number. The password is case-sensitive, so please note your use of upper case and lower case characters.)

VERIFY PASSWORD: [] *

Choose your Security Question:

Step 1: Choose Security Question and Answer.

Step 2: Choose Secret Word.

Step 3: Click the Select Next button.

Note: The token question is the question that will allow you to reset your password yourself. The secret word is something you would provide the Tier One Support area if you needed for your password to be reset.

Create your User ID & Password:
Please choose a user ID and password for your account.

USER ID: * (Must be 3-15 characters long and may only contain letters, numbers, and the underscore(_) character, and start with a letter or number.)

SELECT PASSWORD: * (Must be at least 8 characters long, contain only letters, numbers or special characters, and must contain at least 1 letter and 1 number. The password is case-sensitive, so please note your use of upper case and lower case characters.)

VERIFY PASSWORD: *

Answer your Security Questions:

1) Forgot Password Question: This question will be used online if you forget your password. You can reset the password yourself if you answer this question correctly.

TOKEN QUESTION: * **Step 1: Choose a Token Question and Answer.**

TOKEN ANSWER: * (Case sensitive)

VERIFY TOKEN ANSWER: * (Case sensitive)

2) Secret Word: You will be asked this word in order for us to identify you if you call in to Shared Health®. Please choose something you'll remember, but not something easily guessed.

SECRET WORD: * (May only contain up to 50 characters - only letters and spaces)

Step 2: Select the secret word.

Step 3: Click Select Next button.

(* indicates a required field)

The next screen is the User Agreement.

Step 4: Click the I have read and accept button to proceed.

HOME » ACCOUNT MANAGEMENT

Clinical User Registration

Step 3 of 4: Accept the Clinical User Agreement

You must accept the below agreement to continue with registration.

This User Agreement ("Agreement") is entered into by and between Shared Health®, Inc. ("Shared Health") and you, the user ("you", "your", or "user"), and governs your use of the Shared Health, Inc. Internet web site and related information, data, and other content on that web site ("Content"). The web site is available on the World Wide Web at the Uniform Resource Locator ("URL") <http://www.SharedHealth.com> ("SharedHealth.com").

NOTE: If you are a State of Tennessee employee, independent contractor or other member of the workforce as defined by HIPAA and have executed a written document governing your Terms and Conditions of Use, the provisions of this Provider User Agreement do not apply.

- 1. Agreement with Shared Health.** Shared Health hereby grants you a limited, non-exclusive, non-assignable and non-transferable license to access and use the on-line services available at SharedHealth.com, provided and expressly conditioned on your agreement and satisfaction of the terms and conditions in this Agreement. This license may be revoked by Shared Health in whole or in part, at any time, with or without cause.
- 2. Access.** Certain portions of SharedHealth.com and certain Content will be accessible only to users previously identified to Shared Health who meet criteria established by Shared Health ("Authorized Users") based on information provided by them or on their behalf. You may not access such portions of SharedHealth.com or such Content unless you meet all criteria of an Authorized User. You may not permit any other person to access SharedHealth.com or the Content using your user identification number or password. All information you provide to Shared Health must be current, accurate, and complete. You are responsible for any acts or omissions relating to your use of SharedHealth.com, and for any damages incurred as a result thereof.
- 3. Patient Data and Legal Compliance.** You represent and warrant that you will, at all times during the term of this Agreement and thereafter, comply with all laws directly or indirectly applicable to you that may now or hereafter govern the gathering, use, transmission, processing, receipt, reporting, disclosure, maintenance, and storage of the Content, including without limitation confidential patient information, and use your best efforts to cause all persons or entities under your direction or control to comply with such laws. You are, at all times during the term of this Agreement and thereafter, responsible for obtaining and maintaining all patient consents and all other legally necessary consents or permissions required or advisable to disclose, process, retrieve, transmit, and view the Content you transmit, store or receive in connection with SharedHealth.com or the services provided thereon. You agree that Shared Health, our licensors, and all other persons or entities involved in the operation of services provided through SharedHealth.com, have the right to monitor, retrieve, store and use Content in connection with the operation of SharedHealth.com. SHARED HEALTH CANNOT AND DOES NOT ASSUME ANY RESPONSIBILITY FOR YOUR USE OR MISUSE OF CONTENT TRANSMITTED, MONITORED, STORED OR RECEIVED USING SharedHealth.com. THE ONLY PERMITTED USE OF WWW.SHAREDHEALTH.COM AND THE RELATED CONTENT IS FOR TREATMENT, PAYMENT AND HEALTHCARE OPERATIONS OF COVERED ENTITIES AS DEFINED IN THE HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT OF 1996 (HIPAA). ANY OTHER USE OF THIS SERVICE IS CONSIDERED A VIOLATION OF THE HIPAA PRIVACY REGULATIONS AND THIS AGREEMENT.
- 4. Ownership.** (a) All of the Content available at SharedHealth.com is valuable, exclusive property of Shared Health or its

You may contact Shared Health with questions concerning this Shared Health User Agreement.

Step 4: Click I have read and accept button.

Clicking the accept button above will start the processing of your registration. Please allow time for the registration to go through, since this may take several seconds.

The NPI Association screen is where the User will enter all NPI #s they are associated with. They should enter all NPI #s for all facilities and clinicians with whom they directly work, including their own NPI #.

Clinical User Registration

Step 4 of 4: Request Your NPI Associations

Congratulations - you've reached the final step! You've just created your account and are logged in.

Now please add all National Provider Identifiers (NPIs) with which you are associated to the list below. This should be all facilities and clinicians with whom you directly work, including yourself, if you have an NPI. When using the Shared Health CHR™, you will only be able to act on behalf those NPIs (practices and clinicians) whose entity authority has approved your association to that NPI. You will need **at least one approved NPI association** before you can access the CHR.

Once you have requested all your NPI associations, click the **Finished** button, which will complete the registration process and take you to the Main Menu.

UNAUTHORIZED ACCESS TO THIS SYSTEM AND/OR THE USE OR DISCLOSURE OF PROTECTED HEALTH INFORMATION IS IN VIOLATION OF FEDERAL & STATE HEALTHCARE LAWS AND REGULATIONS RELATING TO FRAUD, ABUSE AND HIPAA. VIOLATORS SHALL BE SUBJECT TO CIVIL DAMAGES AND/OR CRIMINAL PROSECUTION UNDER FEDERAL AND STATE LAWS AND REGULATIONS.

Enter additional NPI #s. Click on Enter NPI Associations button.

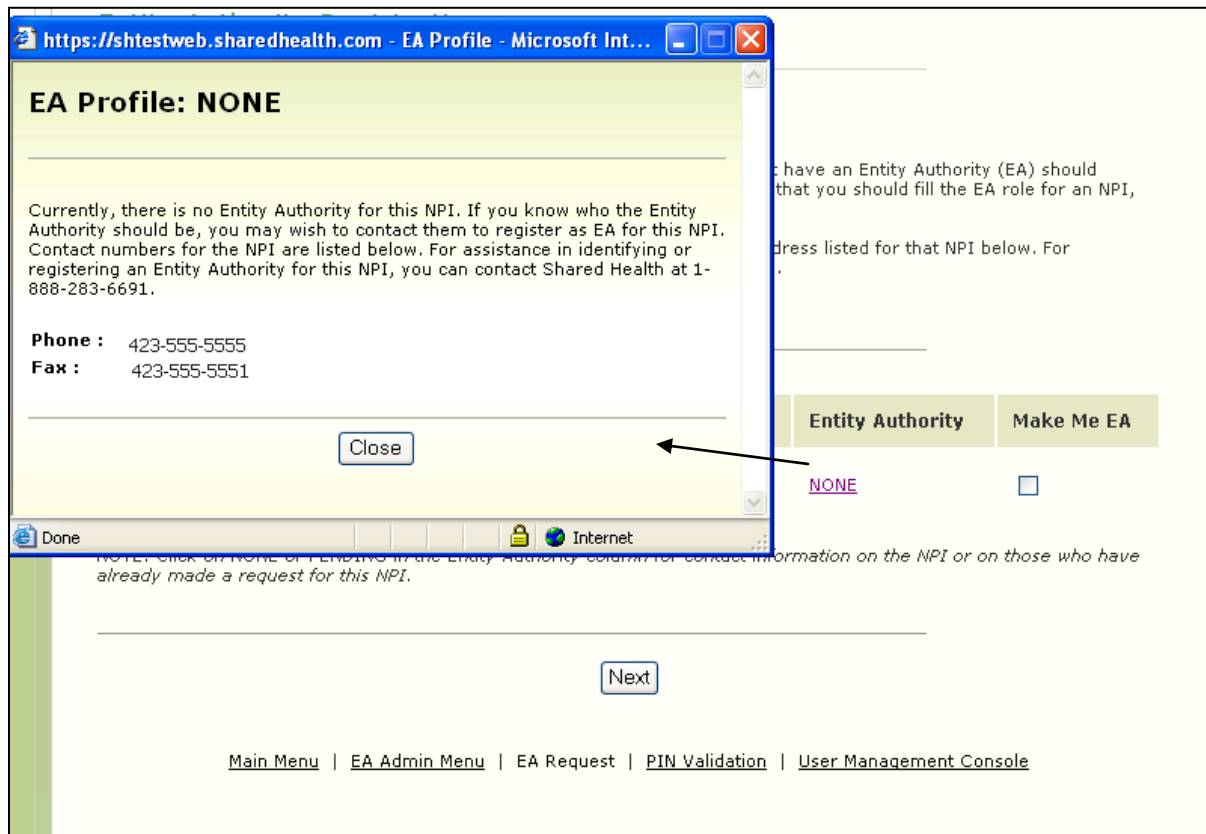
ENTER NPI :

NPI	Name	Address	Entity Authority	
1316930944	Jay D Smith	7685 Winchester Rd Memphis , TN 381252202	PENDING	<input type="button" value="Delete"/>

Click the Finished button.

Entity Authority Selection:

Clicking the **NONE** link underneath Entity Authority will generate the EA Profile pop-up box as shown below.

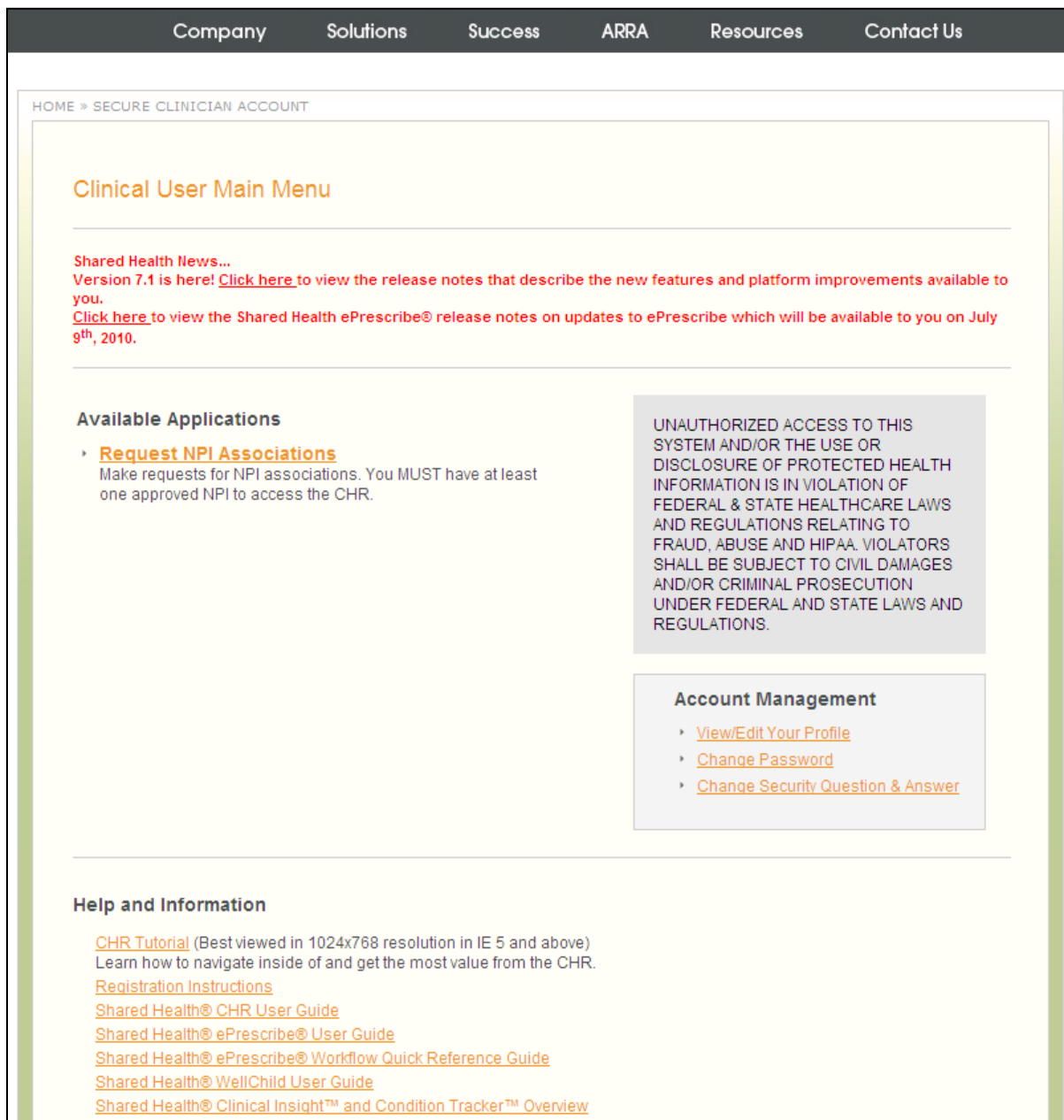


What is an Entity Authority?

An Entity Authority is the person within a facility, practice, or office that is designated to provide oversight and has authority over the implementation of the Shared Health Clinical Health Record®. This person is typically someone who is an owner, partner, shareholder, etc., or does one of the following on behalf of the facility, practices, office, etc.: signs legal documents, signs checks, makes hiring decisions, etc. The Entity Authority is responsible for monitoring all Shared Health® user activity within their facility, practice, or office, approving user access requests and assigning role based permissions. The Entity Authority will receive all communications from Shared Health concerning the facilities, practices, or office's use of the application.

The Prescribing Clinician registration is complete.

You will need to contact Shared Health to have your User Role authenticated and upgraded. Please call Tier One Support at (888) 283-6691 or your local Clinical Health Team Lead.



Company Solutions Success ARRA Resources Contact Us

HOME > SECURE CLINICIAN ACCOUNT

Clinical User Main Menu

Shared Health News...
Version 7.1 is here! [Click here](#) to view the release notes that describe the new features and platform improvements available to you.
[Click here](#) to view the Shared Health ePrescribe® release notes on updates to ePrescribe which will be available to you on July 9th, 2010.

Available Applications

- ▶ [Request NPI Associations](#)
Make requests for NPI associations. You MUST have at least one approved NPI to access the CHR.

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Account Management

- ▶ [View/Edit Your Profile](#)
- ▶ [Change Password](#)
- ▶ [Change Security Question & Answer](#)

Help and Information

- [CHR Tutorial](#) (Best viewed in 1024x768 resolution in IE 5 and above)
Learn how to navigate inside of and get the most value from the CHR.
- [Registration Instructions](#)
- [Shared Health® CHR User Guide](#)
- [Shared Health® ePrescribe® User Guide](#)
- [Shared Health® ePrescribe® Workflow Quick Reference Guide](#)
- [Shared Health® WellChild User Guide](#)
- [Shared Health® Clinical Insight™ and Condition Tracker™ Overview](#)



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[Shared Health® WellChild User Guide](#)

[Shared Health® Clinical Insight™ and Condition Tracker™ Overview](#)

[Shared Health® Clinical Insight™ and Condition Tracker™ Training Manual](#)

[Shared Health® Clinical Insight™ and Condition Tracker™ Quick Reference Guide](#)

Entity Authorities

[Entity Authority Administration Menu](#) Request PIN letters, make NPI / PIN associations.

[What is an Entity Authority?](#)

Resources

[National Plan & Provider Enumeration System \(NPPES\)](#)

Update your NPI information on the NPPES web site.

[Medicare Incentive Program](#)

Click here for the CMS practical guide to this incentive program.

[Shared Health HIPAA Training Session](#)

Jennifer Adams, Compliance, Privacy and Security Officer at Shared Health, spoke to a group of physicians and office staff who are members of the Cumberland Pediatric Foundation and IPA at a seminar specifically designed to be a high-level overview of the ARRA (aka Stimulus Package) and HIPAA changes that go into effect beginning in September 2009 and will continue over the next few years. [Click here to view the presentation.](#)

Scenario 2: Clinical Staff and/or Administrative Staff register

Note: Clinical Staff who do not have their own NPI # and all Administrative Staff fall under this scenario.

Step 1: Click the Clinical and Administrative Staff radio button.

Step 2: Click the Next button.

HOME

Clinical User Registration

Step 1 of 4: Enter Your National Provider Identifier

Although the Shared Health CHR™ can be accessed by various types of clinical staff, certain users must register using their individual National Provider Identifier (NPI).

Choose one of the two options below:

Physicians (NPI required: Includes Physicians, Nurse Practitioners, PAs and other Mid-level Practitioners)

If you are a care provider who bills for services and claims are filed under your name, you probably have an NPI, and you should have a Shared Health registration. If you do not yet have an NPI, please register with the [National Plan and Provider Enumeration System](#) and return to register with Shared Health once you have your NPI. If you do not register with your individual NPI, we will not be able to identify you in the system, and some application functionality may not be available to you.

Clinical and Administrative Staff (NPI not required)

All Clinical staff who do not have a National Provider Identifier and all Administrative staff should choose this option.

Step 3: Enter User Information on the Account Information Form.

Note: The asterisk (*) indicates a required field.

Required fields are as follows:

- First and Last Name
- Gender
- Practice Address
- Practice City, State, and ZIP Code
- Office Phone #
- Office Fax #
- Billing Tax # - Click the (+) Add More link to add additional TIN #s
- Valid Email Address

Clinical User Registration

Step 2 of 4: Complete your Account Information
 Please complete the form below. Required fields are marked with an asterisk (*).
 If you have any problems completing this form, please contact us at 1-888-283-6691.

Enter your Individual Information:

FIRST NAME:	<input type="text" value="Simon"/>	*
MIDDLE NAME:	<input type="text"/>	
LAST NAME:	<input type="text" value="Smith"/>	*
SUFFIX:	<input type="text"/> (e.g: Jr., Sr.)	
GENDER:	<input type="radio"/> M <input type="radio"/> (M/F)*	
PRACTICE ADDRESS LINE 1:	<input type="text" value="401 Chestnut Street"/>	*
PRACTICE ADDRESS LINE 2:	<input type="text"/>	
PRACTICE CITY:	<input type="text" value="Chattanooga"/>	*
STATE:	<input type="text" value="TN"/> <input type="button" value="v"/>	*
ZIP:	<input type="text" value="37402"/>	*
TELEPHONE NUMBER:	(<input type="text" value="423"/>) <input type="text" value="555"/> <input type="text" value="5555"/> * ext: <input type="text"/>	
FAX NUMBER:	(<input type="text" value="423"/>) <input type="text" value="555"/> <input type="text" value="5551"/> *	
ENTER ONE OR MORE BILLING TAX ID(s):	<input type="text" value="123456789"/> * (+ Add More)	
E-MAIL:	<input type="text" value="Ssmith@sharedhealth.com"/>	*
VERIFY E-MAIL:	<input type="text" value="Ssmith@sharedhealth.com"/>	*

Step 3: Enter Individual Information.

The lower section of the Account Information Form is shown below.

Additional required fields are:

- Verify Email Address
- Date of Birth
- Create User ID
- Select Password
- Verify Password
- Choose Token Question
- Choose Token Answer
- Verify Token Answer

Step 4: Click the Select Next button.

Create your User ID & Password:

Please choose a user ID and password for your account.

USER ID: * (Must be 3-15 characters long and may only contain letters, numbers, and the underscore(_) character, and start with a letter or number.)

SELECT PASSWORD: * (Must be at least 8 characters long, contain only letters, numbers or special characters, and must contain at least 1 letter and 1 number. The password is case-sensitive, so please note your use of upper case and lower case characters.)

VERIFY PASSWORD: *

Answer your Security Questions:

1) Forgot Password Question: This question will be used online if you forget your password. You can reset the password yourself if you answer this question correctly.

TOKEN QUESTION: * (Case sensitive)

TOKEN ANSWER: * (Case sensitive)

VERIFY TOKEN ANSWER: * (Case sensitive)

2) Secret Word: You will be asked this word in order for us to identify you if you call in to Shared Health®. Please choose something you'll remember, but not something easily guessed.

SECRET WORD: * (May only contain up to 50 characters - only letters and spaces)

(* indicates a required field)

Step 4: Click the Select Next button.

Upper section of User Agreement:

Clinical User Registration

Step 3 of 4: Accept the Clinical User Agreement

You must accept the below agreement to continue with registration.

This User Agreement ("Agreement") is entered into by and between Shared Health®, Inc. ("Shared Health") and you, the user ("you", "your", or "user"), and governs your use of the Shared Health, Inc. Internet web site and related information, data, and other content on that web site ("Content"). The web site is available on the World Wide Web at the Uniform Resource Locator ("URL") <http://www.SharedHealth.com> ("SharedHealth.com").

NOTE: If you are a State of Tennessee employee, independent contractor or other member of the workforce as defined by HIPAA and have executed a written document governing your Terms and Conditions of Use, the provisions of this Provider User Agreement do not apply.

- 1. Agreement with Shared Health.** Shared Health hereby grants you a limited, non-exclusive, non-assignable and non-transferable license to access and use the on-line services available at SharedHealth.com, provided and expressly conditioned on your agreement and satisfaction of the terms and conditions in this Agreement. This license may be revoked by Shared Health in whole or in part, at any time, with or without cause.
- 2. Access.** Certain portions of SharedHealth.com and certain Content will be accessible only to users previously identified to Shared Health who meet criteria established by Shared Health ("Authorized Users") based on information provided by them or on their behalf. You may not access such portions of SharedHealth.com or such Content unless you meet all criteria of an Authorized User. You may not permit any other person to access SharedHealth.com or the Content using your user identification number or password. All information you provide to Shared Health must be current, accurate, and complete. You are responsible for any acts or omissions relating to your use of SharedHealth.com, and for any damages incurred as a result thereof.
- 3. Patient Data and Legal Compliance.** You represent and warrant that you will, at all times during the term of this Agreement and thereafter, comply with all laws directly or indirectly applicable to you that may now or hereafter govern the gathering, use, transmission, processing, receipt, reporting, disclosure, maintenance, and storage of the Content, including without limitation confidential patient information, and use your best efforts to cause all persons or entities under your direction or control to comply with such laws. You are, at all times during the term of this Agreement and thereafter, responsible for obtaining and maintaining all patient consents and all other legally necessary consents or permissions required or advisable to disclose, process, retrieve, transmit, and view the Content you transmit, store or receive in connection with SharedHealth.com or the services provided thereon. You agree that Shared Health, our licensors, and all other persons or entities involved in the operation of services provided through SharedHealth.com, have the right to monitor, retrieve, store and use Content in connection with the operation of SharedHealth.com. SHARED HEALTH CANNOT AND DOES NOT ASSUME ANY RESPONSIBILITY FOR YOUR USE OR MISUSE OF CONTENT TRANSMITTED, MONITORED, STORED OR RECEIVED USING SharedHealth.com. THE ONLY PERMITTED USE OF WWW.SHAREDHEALTH.COM AND THE RELATED CONTENT IS FOR TREATMENT, PAYMENT AND HEALTHCARE OPERATIONS OF COVERED ENTITIES AS DEFINED IN THE HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT OF 1996 (HIPAA). ANY OTHER USE OF THIS SERVICE

Lower section of User Agreement:

Step 5: Click I have read and accept button.

Clicking the accept button above will start the processing of your registration. Please allow time for the registration to go through, since t

I have read and accept I do not accept

Step 5: Click I have read and accept button.

The NPI Association screen launches:

Step 6: Enter NPI #.

Step 7: Click the Enter NPI Associations button.

Note: Continue adding all NPI #s with which you are associated by continuing to click the Enter NPI Associations button.

Step 8: Click the Finished button.

Clinical User Registration

Step 4 of 4: Request Your NPI Associations

Congratulations - you've reached the final step! You've just created your account and are logged in.

Now please add all National Provider Identifiers (NPIs) with which you are associated to the list below. This should be all facilities and clinicians with whom you directly work, including yourself, if you have an NPI. When using the Shared Health CHR™, you will only be able to act on behalf those NPIs (practices and clinicians) whose entity authority has approved your association to that NPI. You will need **at least one approved NPI association** before you can access the CHR.

Once you have requested all your NPI associations, click the **Finished** button, which will complete the registration process and take you to the Main Menu.

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Step 6: Enter NPI #.

ENTER NPI :

No Pending NPI Association in list

Step 7: Click the Enter NPI Associations button.

Step 8: Click the Finished button.



Clinical User Registration

Step 4 of 4: Request Your NPI Associations

Congratulations - you've reached the final step! You've just created your account and are logged in.

Now please add all National Provider Identifiers (NPIs) with which you are associated to the list below. This should be all facilities and clinicians with whom you directly work, including yourself, if you have an NPI. When using the Shared Health CHR™, you will only be able to act on behalf those NPIs (practices and clinicians) whose entity authority has approved your association to that NPI. You will need **at least one approved NPI association** before you can access the CHR.

Once you have requested all your NPI associations, click the **Finished** button, which will complete the registration process and take you to the Main Menu.

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ENTER NPI :

NPI	Name	Address	Entity Authority	
<u>1316930944</u>	Jay D Smith	7685 Winchester Rd Memphis , TN 381252202	<u>PENDING</u>	<input type="button" value="Delete"/>

The Clinical Staff and/or Administration Staff registration is complete; however, you will need to contact our Tier One Support at (888) 283-6691 and request the appropriate user role.

Note: You will not have access to the Clinical Health Record until the Entity Authority has approved access.

Clinical User Main Menu

Shared Health News...
Version 7.1 is here! [Click here](#) to view the release notes that describe the new features and platform improvements available to you.
[Click here](#) to view the Shared Health ePrescribe® release notes on updates to ePrescribe which will be available to you on July 9th, 2010.

Available Applications

- ▶ **Request NPI Associations**
Make requests for NPI associations. You MUST have at least one approved NPI to access the CHR.

UNAUTHORIZED ACCESS TO THIS SYSTEM AND/OR THE USE OR DISCLOSURE OF PROTECTED HEALTH INFORMATION IS IN VIOLATION OF FEDERAL & STATE HEALTHCARE LAWS AND REGULATIONS RELATING TO FRAUD, ABUSE AND HIPAA. VIOLATORS SHALL BE SUBJECT TO CIVIL DAMAGES AND/OR CRIMINAL PROSECUTION UNDER FEDERAL AND STATE LAWS AND REGULATIONS.

Account Management

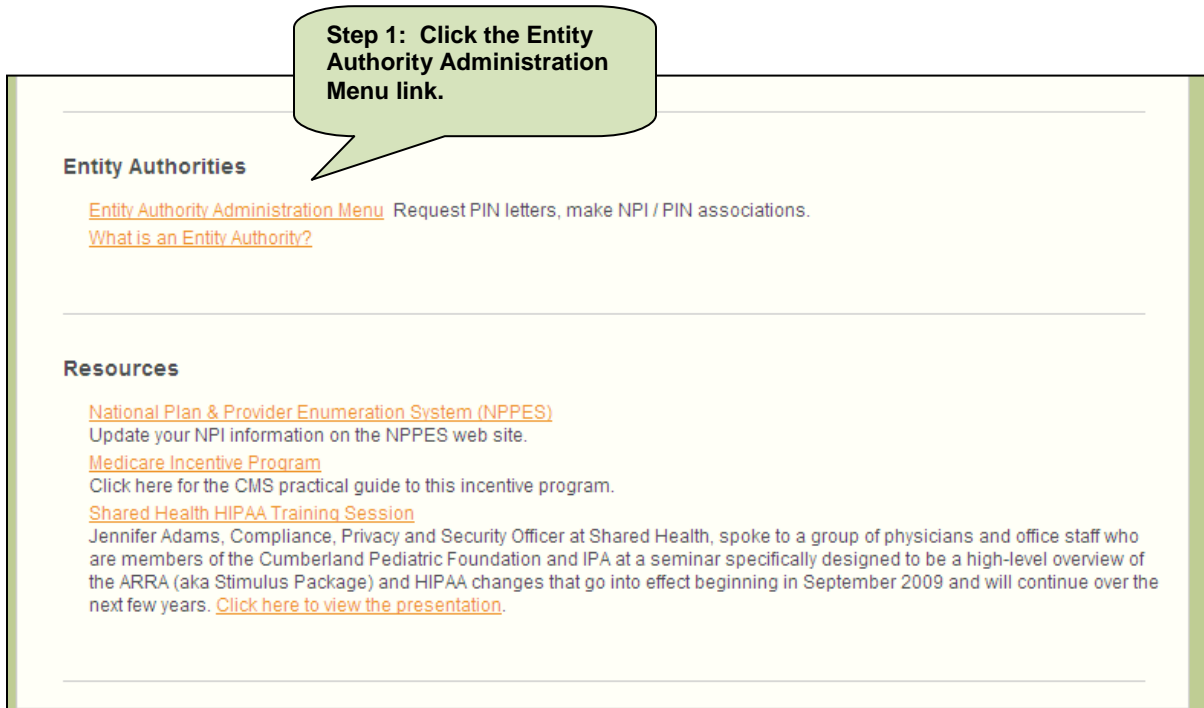
- ▶ [View/Edit Your Profile](#)
- ▶ [Change Password](#)
- ▶ [Change Security Question & Answer](#)

Help and Information

- [CHR Tutorial](#) (Best viewed in 1024x768 resolution in IE 5 and above)
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- [Shared Health® ePrescribe® Workflow Quick Reference Guide](#)
- [Shared Health® WellChild User Guide](#)
- [Shared Health® Clinical Insight™ and Condition Tracker™ Overview](#)
- [Shared Health® Clinical Insight™ and Condition Tracker™ Training Manual](#)
- [Shared Health® Clinical Insight™ and Condition Tracker™ Quick Reference Guide](#)

Scenario 3: Entity Authority is registered

Step 1: Click the Entity Authority Administration Menu link.



Entity Authorities

[Entity Authority Administration Menu](#) Request PIN letters, make NPI / PIN associations.
[What is an Entity Authority?](#)

Resources

[National Plan & Provider Enumeration System \(NPPES\)](#)
Update your NPI information on the NPPES web site.

[Medicare Incentive Program](#)
Click here for the CMS practical guide to this incentive program.

[Shared Health HIPAA Training Session](#)
Jennifer Adams, Compliance, Privacy and Security Officer at Shared Health, spoke to a group of physicians and office staff who are members of the Cumberland Pediatric Foundation and IPA at a seminar specifically designed to be a high-level overview of the ARRA (aka Stimulus Package) and HIPAA changes that go into effect beginning in September 2009 and will continue over the next few years. [Click here to view the presentation.](#)



Step 2: Click the Steps 1 to 3: Entity Authority Request link.

Entity Authority Administration Menu

Entity Authority Registration

- ▶ **Steps 1 to 3: Entity Authority Request**
Send a request to become an Entity Authority for one or more NPIs. You will 1) Select NPIs, 2) Agree to the Entity Authority Agreement, and 3) Choose "Add Patient" options for your NPIs, and if adding patients, sign a BA Agreement. You will be sent a PIN letter, and you will need to validate the PIN online.
- ▶ **Step 4: PIN Validation**
Validate your PIN or, if you've misplaced it, request that a PIN letter be resent.

*NOTE: If you would like to **unregister** as Entity Authority for an NPI, please contact Shared Health® at 1-888-283-6691. We will help you to transfer your EA status to the appropriate individual.*

User Management

- ▶ **User Management Console**
Approve/deny requested NPI associations and manage existing associations.
- ▶ **Request NPI Associations**
Make requests to associate yourself with additional NPIs.
- ▶ **User Role Assignment Form**
Complete the form and fax to the attention of Support at (423) 535-2901.

EA Information

- ▶ **What is an Entity Authority?**
- ▶ **Entity Authority Agreement**
- ▶ **What is Add Patient?**
- ▶ **BA Agreement**

Step 2: Click the Steps 1 to 3: Entity Authority Request link.

Step 3: Check the Make Me EA checkbox.

Step 4: Click the Next button.

Entity Authority Registration

Step 1 of 4: Select NPIs

All National Provider Identifiers (NPIs) with which you are associated that don't have an Entity Authority (EA) should appear in the list below, as well as those for whom you are the EA. If you feel that you should fill the EA role for an NPI, please check the box under the "Make Me EA" column for the appropriate NPI.

IMPORTANT: You will need to be able to receive a verification letter at the address listed for that NPI below. For assistance with this request process, contact Shared Health at 1-888-283-6691.

PENDING / NEW NPI REQUESTS

NPI	Name	Address	Entity Authority	Make Me EA
1316930944	Jay D Smith	7685 Winchester Rd Memphis , TN 381252202	PENDING	<input checked="" type="checkbox"/>

NOTE: Click on NONE or PENDING in the Entity Authority column for contact information on the NPI or on the NPI you have already made a request for this NPI.

Step 4: Click the Next button.

Step 3: Check Make Me EA checkbox.

[Main Menu](#) | [EA Admin Menu](#) | [EA Request](#) | [PIN Validation](#) | [User Management Console](#)

Step 5: Click I have read and I accept checkbox after reviewing the Entity Authority Agreement.

Step 6: Click the Next button.

The screenshot shows a web page titled "Entity Authority Registration". Below the title is a horizontal line. The main heading is "Step 2 of 4: Accept the Entity Authority Agreement". Below this, it says "You have chosen to register yourself as the Entity Authority (EA) for the following NPIs: 1316930944". It then says "Please review the following agreement: [Shared Health Practice Entity Authority Agreement](#)". Below that, it says "By choosing 'I have read and I accept' for each NPI, you are verifying that you have authority to act as EA for these NPIs and are agreeing to the EA Agreement for each NPI." There is a table with two columns: "NPI" and "Entity Authority Agreement". The first row has the NPI "1316930944" and a checked checkbox next to the text "I have read and I accept". Below the table is a note: "NOTE: For complete information on each NPI, click on the NPI number to bring up the profile." At the bottom of the page are two buttons: "Back" and "Next".

Entity Authority Registration

Step 2 of 4: Accept the Entity Authority Agreement

You have chosen to register yourself as the Entity Authority (EA) for the following NPIs:
1316930944

Please review the following agreement: [Shared Health Practice Entity Authority Agreement](#).

By choosing "I have read and I accept" for each NPI, you are verifying that you have authority to act as EA for these NPIs and are agreeing to the EA Agreement for each NPI.

NPI	Entity Authority Agreement
1316930944	<input checked="" type="checkbox"/> I have read and I accept

NOTE: For complete information on each NPI, click on the NPI number to bring up the profile.

[Back](#) [Next](#)

Note: If you do not wish for your organization to have Add a Patient ability, keep the No radio button selected and click the Submit button as shown below.

Entity Authority Registration

Step 3 of 4: Choose "Add Patient" Capability

Please review the table below and specify the policy for each NPI by choosing whether users associated with the NPI should be allowed to add patients to the system. [What is "Add Patient"?](#)

If you allow patients to be added, please review the following agreement: [Shared Health Business Associate Agreement](#). You will need to accept it for each NPI that allows adding patients.

Click "Submit" when done to complete the EA Request.

NPI	Allow "Add Patient"	Business Associate Agreement	Security Contact Name	Security Contact Phone No	Security Contact Title	Security Contact Email
			<input type="text" value="<Enter Default>"/>	<input type="text" value="<Enter Default>"/>	<input type="text" value="<Enter Default>"/>	<input type="text" value="<Enter Default>"/>
1316930944	<input type="radio"/> Yes <input checked="" type="radio"/> No					

No radio button is selected.

Click the Submit button.

Note: If you **do** want your organization to have "Add a Patient" ability, follow the steps on the following page.

Note: The steps below are for organizations wishing to have the Add a Patient ability within their organization.

Step 7: Click the Yes radio button under Allow “Add Patient”

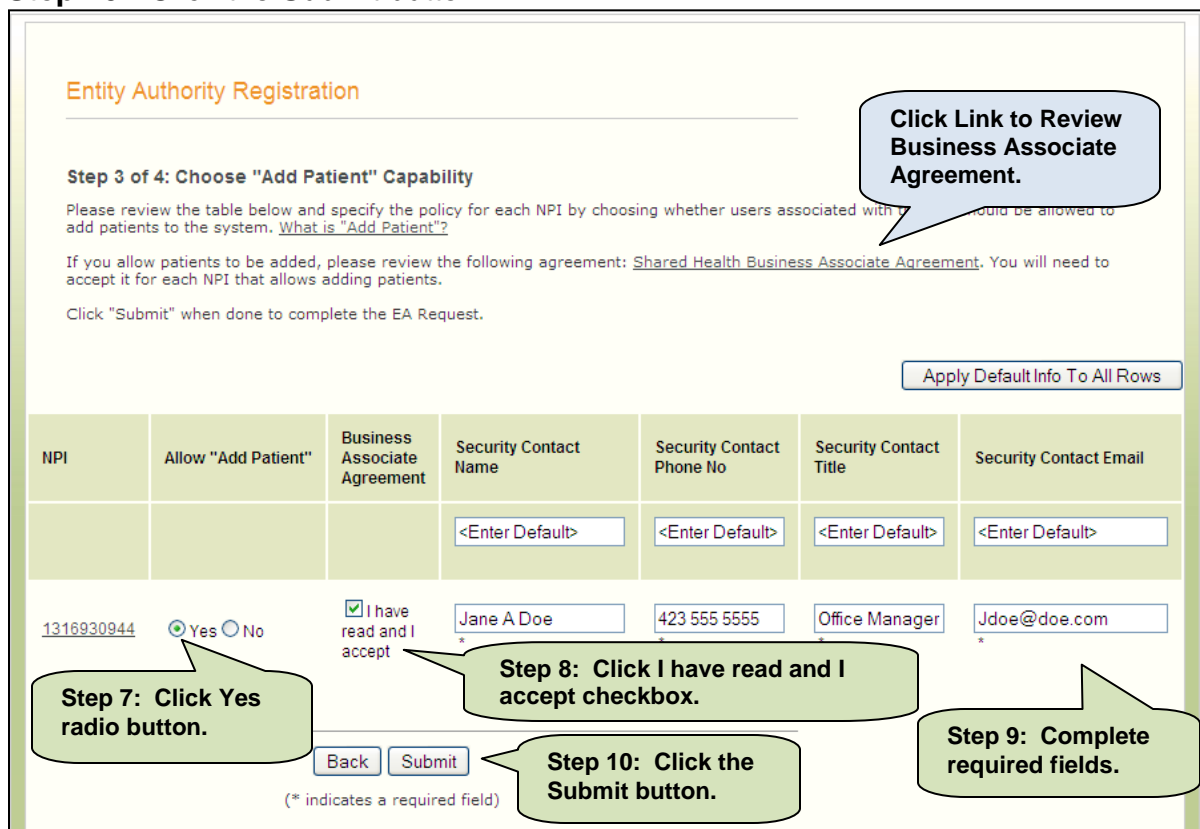
Step 8: Click the Business Associate Agreement I have read and I accept checkbox.

Note: The User may click the Shared Health Business Associate Agreement link to view the entire Business Associate Agreement.

Step 9: Complete the following required fields:

- Security Contact Name
- Security Contact Phone #
- Security Contact Title
- Security Contact Email

Step 10: Click the Submit button.



Entity Authority Registration

Step 3 of 4: Choose "Add Patient" Capability

Please review the table below and specify the policy for each NPI by choosing whether users associated with [redacted] could be allowed to add patients to the system. [What is "Add Patient"?](#)

If you allow patients to be added, please review the following agreement: [Shared Health Business Associate Agreement](#). You will need to accept it for each NPI that allows adding patients.

Click "Submit" when done to complete the EA Request.

[Apply Default Info To All Rows](#)

NPI	Allow "Add Patient"	Business Associate Agreement	Security Contact Name	Security Contact Phone No	Security Contact Title	Security Contact Email
			<Enter Default>	<Enter Default>	<Enter Default>	<Enter Default>
1316930944	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="checkbox"/> I have read and I accept	Jane A Doe	423 555 5555	Office Manager	Jdoe@doe.com

(* indicates a required field)

[Back](#) [Submit](#)

Callout Boxes:

- Step 7:** Click Yes radio button.
- Step 8:** Click I have read and I accept checkbox.
- Step 9:** Complete required fields.
- Step 10:** Click the Submit button.
- Click Link to Review Business Associate Agreement.** (points to the agreement link)

The Entity Authority Registration is complete.

The final step in the Entity Authority Registration is to enter the PIN Validation.

The PIN Letter will be mailed to the Entity Authority.

COT may have the PIN # where the registration process will continue and the PIN Letter will arrive later for the Entity Authority to keep on file.

Step 11: Click the PIN Validation link to continue and finalize the Entity Authority Registration.

The screenshot shows a web page titled "Entity Authority Registration" with a sub-header "Entity Authority Request (Steps 1 to 3) is Complete!". Below this, it states: "A verification (PIN) letter will now be mailed to you at the address associated with the NPI. Once you receive your PIN letter, you will need to come back to the site and log in. Click the 'Entity Authority Administration' link and then 'PIN Validation' in order to complete the fourth and final step in the EA registration process." At the bottom of the page is a navigation menu: "Main Menu | EA Admin Menu | EA Request | PIN Validation | User Management Console". A green callout box with a pointer to the "PIN Validation" link contains the text: "Step 11: Click the PIN validation link."

Step 12: Enter the PIN # into the PIN Validation field.

Note: If the PIN Letter was not received by the Entity Authority, the User may click the Resend PIN Letter link.

Step 13: Click the Submit button.

Entity Authority Registration

Step 4 of 4: PIN Validation

Your approved and pending Entity Authority requests are below. Please enter the PIN(s) you received in the mail and click "Submit" to validate. If a PIN letter has been misplaced, click "Resend PIN Letter" to have a copy resent to you at the NPI address on file.

Once the PIN is validated, you have completed the Entity Authority Registration process! Go to the [User Management Console](#) now to manage your users.

NPI	Status	PIN Validation	
1316930944	Pending (enter PIN to confirm)	<input type="text" value="1234"/>	Resend PIN Letter

Step 13: Click the Submit button.

[EA Admin Menu](#) | [EA Request](#) | [PIN Validation](#) | [User Management Console](#)

The Approved Status is displayed below.

Entity Authority Registration

Step 4 of 4: PIN Validation

Your approved and pending Entity Authority requests are below. Please enter the PIN(s) you received in the mail and click "Submit" to validate. If a PIN letter has been misplaced, click "Resend PIN Letter" to have a copy resent to you at the NPI address on file.

Once the PIN is validated, you have completed the Entity Authority Registration process! Go to the [User Management Console](#) now to manage your users.

NPI	Status	PIN Validation	
1316930944	Approved		

Approved Status

User Management Console:

Once the Entity Authority has completed their registration, they may access the User Management Console.

The User Management Console contains pending user requests for an association with their NPI. The Entity Authority may approve or reject access.

Note: *The Entity Authority will have to approve access for all users under the NPI, including themselves.*

Step 1: Click Approve or Reject radio button for all Users requesting to be associated with the Entity Authority's NPI.

Step 2: Click the Submit button.

User Management Console

Your **Pending Requests** are users who have requested an association with your NPI(s) and **Active Associations** are those who have been approved. As the Entity Authority, you have the ability to approve/reject requests and remove active associations for your NPI(s).

IMPORTANT: If your NPI **does not allow patients to be added** to the CHR, please note any users that may have been granted an "Add Patient" role for another NPI. Roles are system-wide, so please inform your users that they cannot add your NPI's patients. As roles can change, we recommend as a general rule that you inform new users of any policies specific to your practice when the association is approved.

PENDING ASSOCIATION REQUESTS FILTER NPI:

NPI	User ID	Name	Role(s)	Action
1316930944	jsmith1102	Jay D Smith	Non-Clinical Staff	<input checked="" type="radio"/> Approve <input type="radio"/> Reject
1316930944	fsmith1102	Faith Smith	Non-Clinical Staff	<input checked="" type="radio"/> Approve <input type="radio"/> Reject

Step 2: Click the Submit button.

Step 1: Click Approve or Reject radio button.

The User Management Console is where the Entity Authority will remove a User's access.

Step 1: Click the Remove checkbox.

Step 2: Select a Removal Reason.

Step 3: Click the Submit button.

User Management Console

Your **Pending Requests** are users who have requested an association with your NPI(s) and **Active Associations** are those who have been approved. As the Entity Authority, you have the ability to approve/reject requests and remove active associations for your NPI(s).

IMPORTANT: If your NPI **does not allow patients to be added** to the CHR, please note any users that may have been granted an "Add Patient" role for another NPI. Roles are system-wide, so please inform your users that they cannot add your NPI's patients. As roles can change, we recommend as a general rule that you inform new users of any policies specific to your practice when the association is approved.

ACTIVE ASSOCIATIONS FILTER NPI: ALL

NPI	User ID	Name		Remove	Removal Reason
1316930944	ismith1102	Jay D Smith	Non-Clinical Staff	<input type="checkbox"/>	<div style="border: 1px solid black; padding: 2px;"> -Choose One- -Choose One- Left Practice Access no longer required Abuse </div>
1316930944	fsmith1102	Faith Smith	Non-Clinical Staff	<input type="checkbox"/>	

Step 1: Check the Remove checkbox.

Step 2: Select a Removal Reason.

Step 3: Click the Submit button.

You will need to contact Shared Health to have your User Role authenticated and upgraded. Please call Tier One Support at (888) 283-6691 or your local Clinical Health Team Lead.

You will access the Clinical Health Record by clicking on the following link:

Clinical User Main Menu

Shared Health News...
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[Click here](#) to view the Shared Health ePrescribe® release notes on updates to ePrescribe which will be available to you on July 9th, 2010.

Available Applications

- ▶ **[Clinical Health Record & ePrescribe](#)**
Find information on patients or prescribe for a patient. If you cannot see medical information or prescribe, and you need this ability, you must have an upgraded role, since by default only non-medical information is available. Please call 1-888-283-6691 to upgrade your role.
- ▶ **[Clinical Insight™ \(& Condition Tracker™\)](#)**
View and manage the care delivered across your patient population. Shared Health® Clinical Insight™ allows authorized users to generate and display online reports which help evaluate adherence to evidence-based quality measures, create action lists for workflow integration, and manage transparency and performance program scores. After identifying opportunities, jump into Condition Tracker™ for a patient-centric view. Use this registry application to manage chronic conditions by collaboratively adding and tracking key clinical indicators.
- ▶ **[Request NPI Associations](#)**
Make requests for NPI associations. You MUST have at least one approved NPI to access the CHR.

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- ▶ [Change Password](#)
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Training Resources

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- [Shared Health® ePrescribe® User Guide](#)
- [Shared Health® ePrescribe® Workflow Quick Reference Guide](#)
- [Shared Health® WellChild User Guide](#)

Training resources are available to you 24/7/365. Please access the CHR tutorial for an interactive training resource, or you may view the following User Guides:

- CHR User Guide
- ePrescribe User Guide
- WellChild User Guide