COLLEGE of AMERICAN PATHOLOGISTS
Advocacy
Pathologists Quality Registry

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Pathologists Quality Registry

Enrollment Portal

Quick Start Guide - Version 3.0

Table of Contents

1. Introduction

CAP enrollment portal is accessible only to those with a CAP Web Account. This quick reference guide provides a brief overview of the enrollment process for participating in the CAP registry. The enrollment portal provides a user-friendly interface to enroll practices and pathologists to the CAP registry and update information throughout the year.

2. Users of the Portal

Two categories of users can access the portal - New Users and Returning Users.

2.1. New Users

New users are defined as the users who intend to enroll their practice with the CAP registry. The new users may or may not be CAP members, such as an office administrator.The enrollment process for new users involves:

- Creating a CAP Web Account
- Enrolling using Enrollment Portal
- Signing the Business Associate Agreement (BAA), Data Warehousing, and Participation agreement electronically.

2.2. Returning Users

The returning users are the users whose practice participated in the CAP Pathologist Quality Registry and in prior years can access the portal to re-enroll for the next year.

- Registered users can use the CAP Web Account to access the enrollment portal.
  The non-registered users/users in doubt about their Web Account, need to contact **registry.inquiries@cap.org**.

For Returning Users

- The Enrollment Portal prepopulates the previously filled practice information.

If required, they can edit or delete the displayed information.

- Practice Agreement is auto-renewed on receipt of payment for the current financial year - 2020..
- No-need to sign the agreement.
- Navigate to the payment step to make payment.

3. Practice Enrollment Process

A practice is enrolled through the practice enrollment portal. The portal captures information about the practice being on-boarded, the pathologists associated with the said practice, practice locations and TIN.. The process uses the following five steps to capture the required information.

A successful login attempt generates a message stating the Quality Data Entry options available for MIPS reporting (Figure **1**).

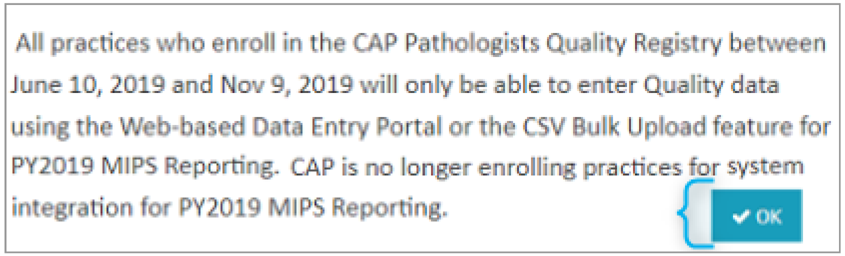


Figure 1: Message for Quality Data Entry

Action Required:

- Click **OK** to continue.
  The Practice Enrollment Portal opens (Figure **2 & 3**).

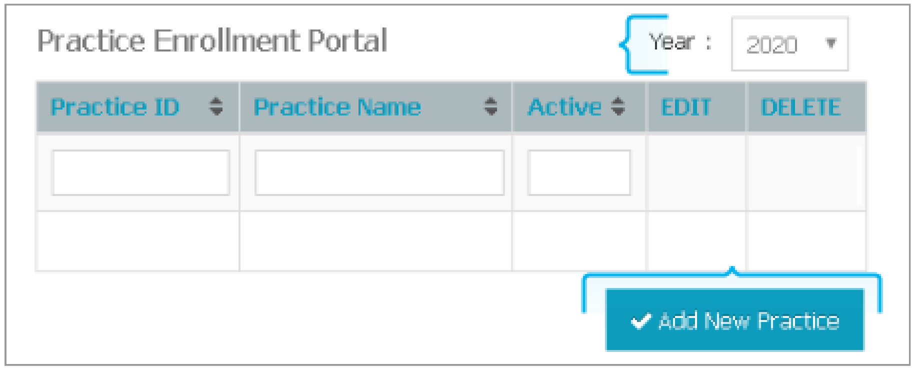


Figure 2: New User - Practice Enrollment Portal

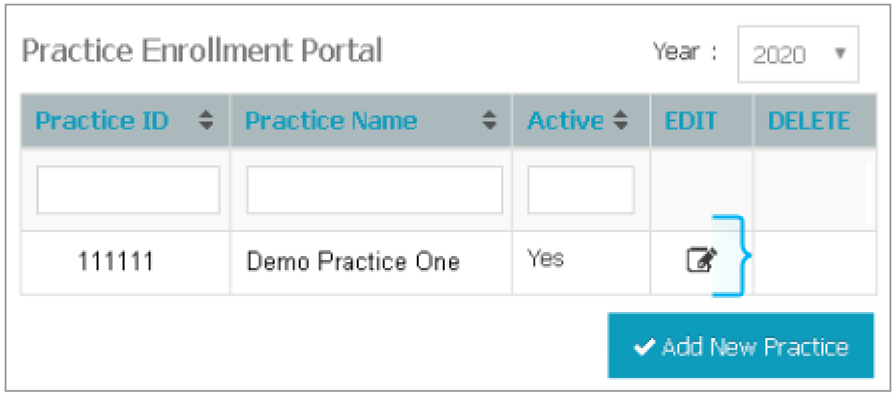


Figure 3: Returning User - Practice Enrollment Portal

<table>
<tr><th>Action Required</th><th>Key Points</th></tr>
<tr><td>

Select 2020 from the year drop-down to enroll practices for the current year (Figure 2).
Click Add New Practice button to enroll a practice to CAP. The Practice Information and Contact page displays.
Click the Edit icon to update the existing practice information (Figure 3).
Click the Delete icon to remove an inactive practice(Figure 3).

</td><td>

For new users, the Practice Enrollment table will not have any records.
The Practice Enrollment table allows to

Add or Edit
Pathologist
Location
TIN
Process
Agreement
Pathologist’s Payment

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

3.1. Practice Information and Contact

This is the first step of the enrollment process. It captures demographic information related to the Practice as well as Practice Admin contact details.

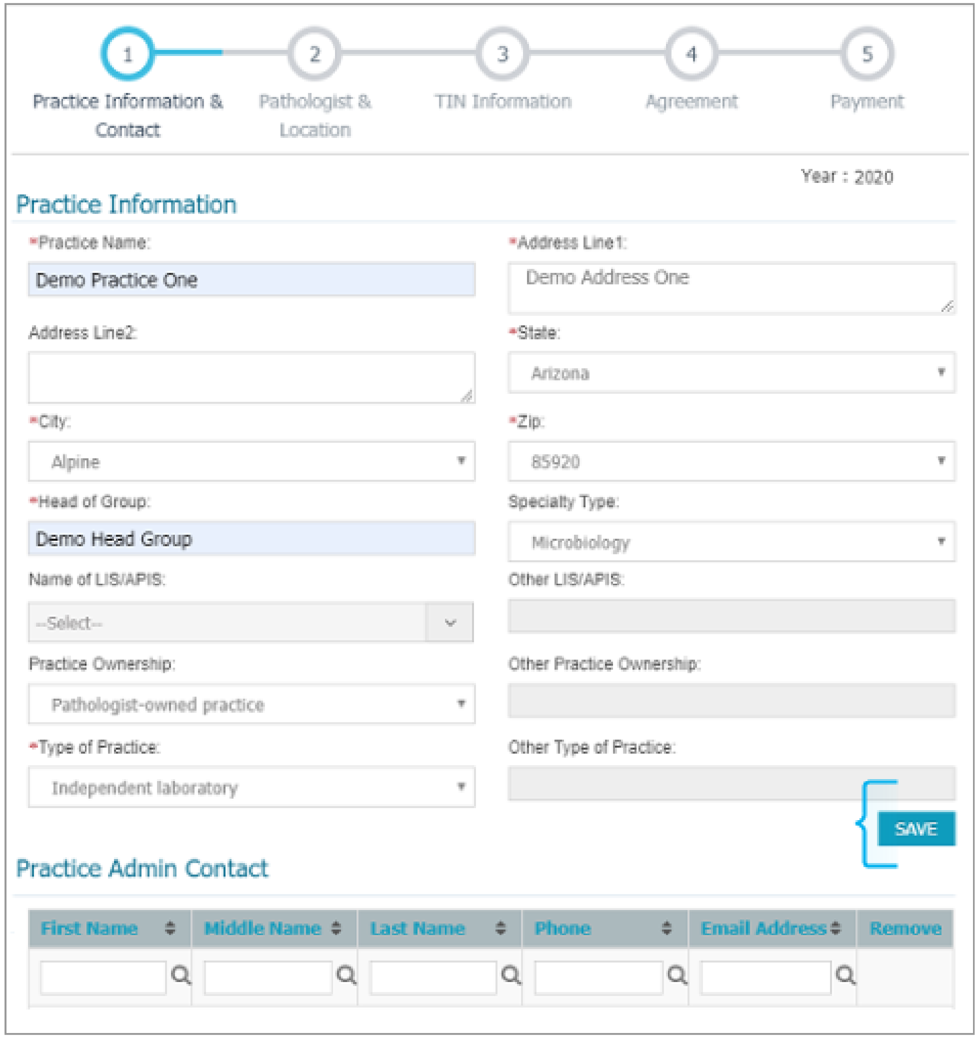


Figure 4: Practice Information & Contact Page

Key Points

- The page is divided into two sections: **Practice Information** and **Practice Admin Contact**.
- Once the practice information is saved, the Primary Admin Contact is added automatically and cannot be deleted.
- The individual enrolling the practice will be the Primary Admin Contact unless a different contact for this role is provided. The Primary Admin has special authority (see next section).
- The fields marked with red * are mandatory fields.
- Based on the selection in fields - Speciality type, Practice Ownership and Type of Practice their corresponding fields are enabled/disabled.

Action Required:

1. Enter the required information (Figure **4**).
2. Click **SAVE**.
   A record gets added to the Practice Admin Contact table.

3.1.1. Practice Admin Contact

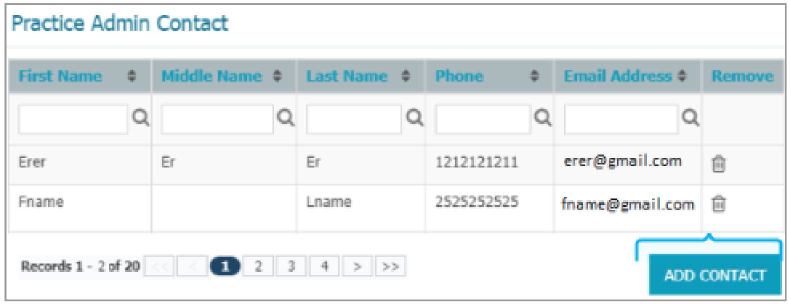


Figure 5: Practice Admin Contact Table

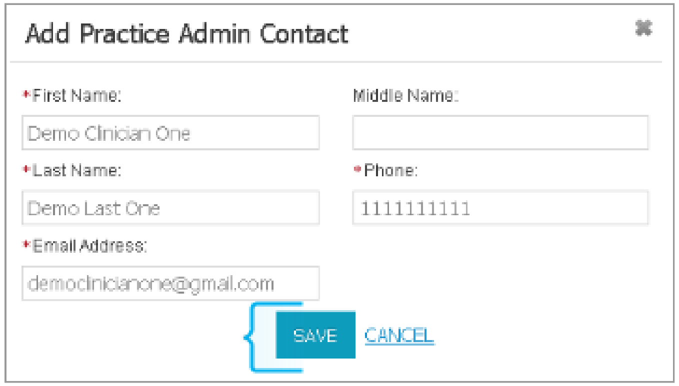


Figure 6: Add Practice Admin Contact Window

Key Points

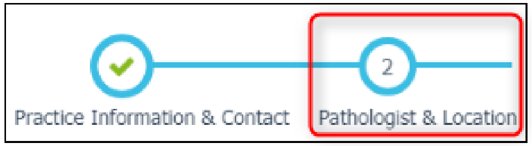
- Practice Admin has the authority to:
  - Add pathologists
  - Add locations
  - Add TIN to the practice
  - Sign the practice agreement
  - Process payment
- Click
  - The required Admin Contact record to update the existing details.
  - Delete icon to remove a record.
  - **ADD CONTACT** button to add another Practice Admin Contact.
- A green check mark replaces the numbered step at the top of the screen on completion of adding practice information.

Action Required:

1. Click **ADD CONTACT** (Figure **5**).
   Add Practice Admin Contact window is displayed
2. Enter the required information in the mandatory fields and click **SAVE** (Figure **6**).
   The created record is added to the Practice Admin Contact table.
3. Click **NEXT** to navigate to the succeeding page..

3.2. Pathologist and Location

This is the 2nd step and captures information about the pathologist(s) and location of the practice. The Pathologist tab is enabled by default.



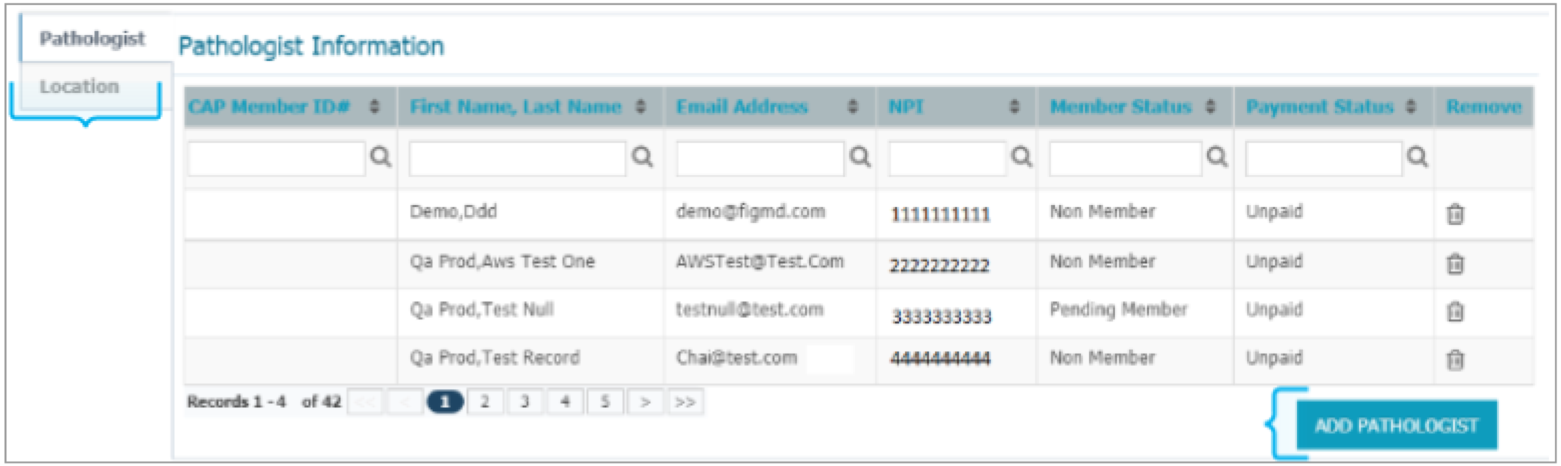


Figure 7: Pathologist and Location Page

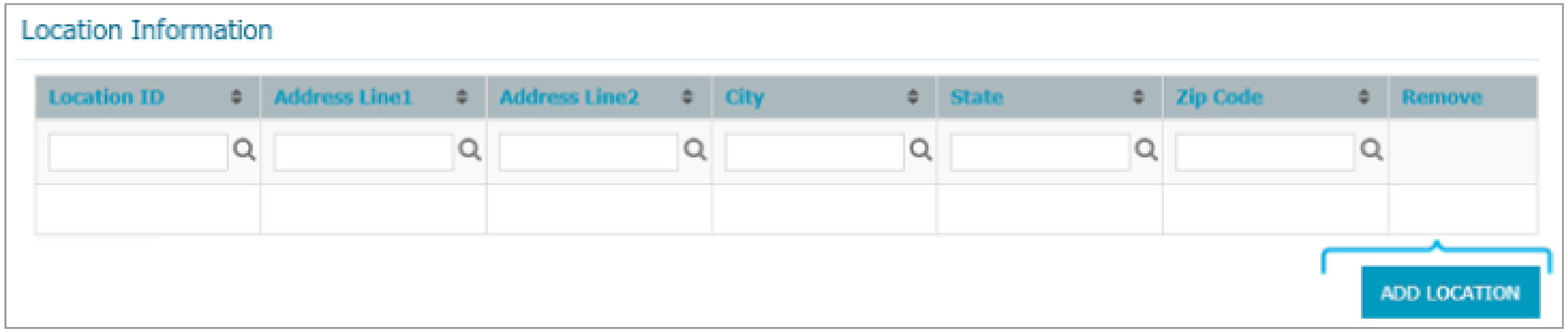


Figure 7A: Location Page

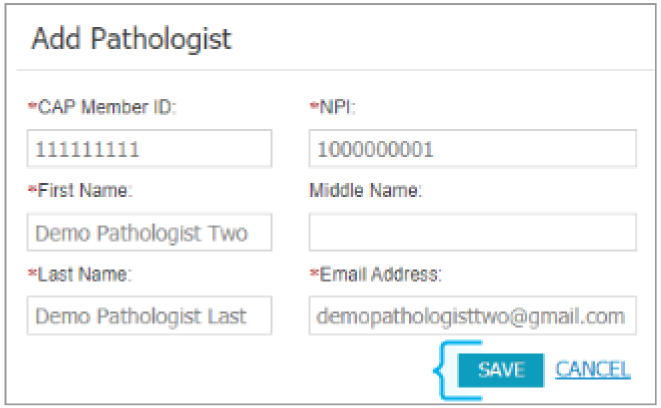


Figure 8: Add Pathologist Window

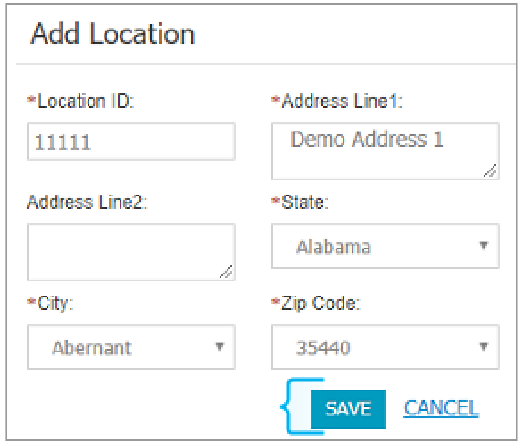


Figure 8A: Add Location Window

Action Required

Pathologist

1. Click **ADD PATHOLOGIST** (Figure **7**).
   The Add Pathologist window opens.
2. Enter the required information in the mandatory fields (Figure **8**). If an error stating there is an issue with the name is encountered, contact registry.inquiries@cap.org. The CAP may need to modify the Member record before that pathologist can be enrolled.
3. Click **SAVE**.
   The new pathologist record is added to the Pathologist Information table.
4. Click **NEXT** to navigate to the succeeding step.

Location:

1. Select Location tab (Figure **7**).
   Location table displays.
2. Click **ADD LOCATION** (Figure **7A**).

Key Points

- The Pathologist Information table displays list of existing pathologists who are currently part of the pathology Practice/Group.
- Click the required pathologist's record to update the existing information
- Use Delete icon to delete the pathologist's information.
- The **Member Status** column displays the current College of American Pathologists membership status of a pathologist. A pathologist can be a CAP member or a non-member.
- Practices define the Location ID.

The Add Location window opens. 3. Enter the mandatory details (Figure **8A**). 4. Click **SAVE**. The created location is added to the location table.	

3.3. TIN Information

The 3rd step is capturing Tax Identification Number (TIN) of the Practice.

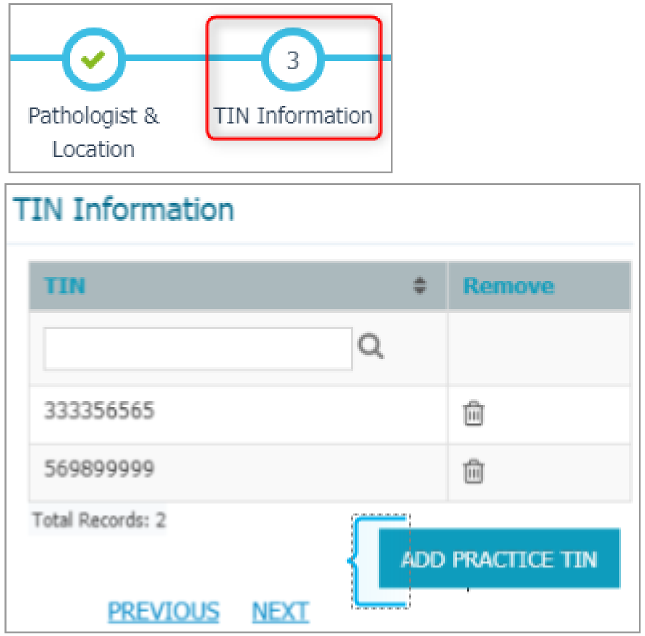


Figure 9: TIN Information Page

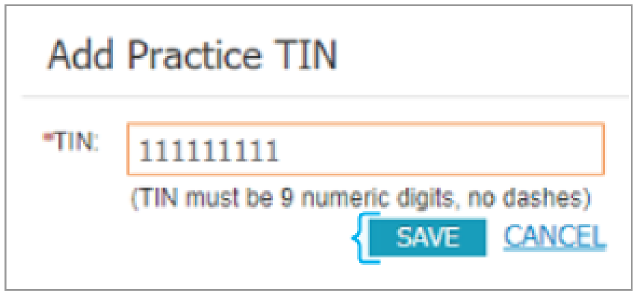


Figure 10: Add Practice TIN Window

Key Points

- Click the required TIN to update the existing details
- Click **Delete** icon to delete the existing TIN record.
- A Practice can have only one TIN associated with it. To add another TIN, you need to add a new practice.

Action Required:

1. Click **ADD PRACTICE TIN** (Figure **9**).
   The Add Practice TIN displays.
   Reference practice's Form 1500 to confirm correct TIN is entered.
2. Enter 9 digit TIN and click **SAVE** (Figure **10**).
   The created TIN record is added to the TIN Information table.
3. Click **NEXT** to navigate to the succeeding page.

3.4. Agreement

This step enables a new practice to sign an agreement with the registry electronically.

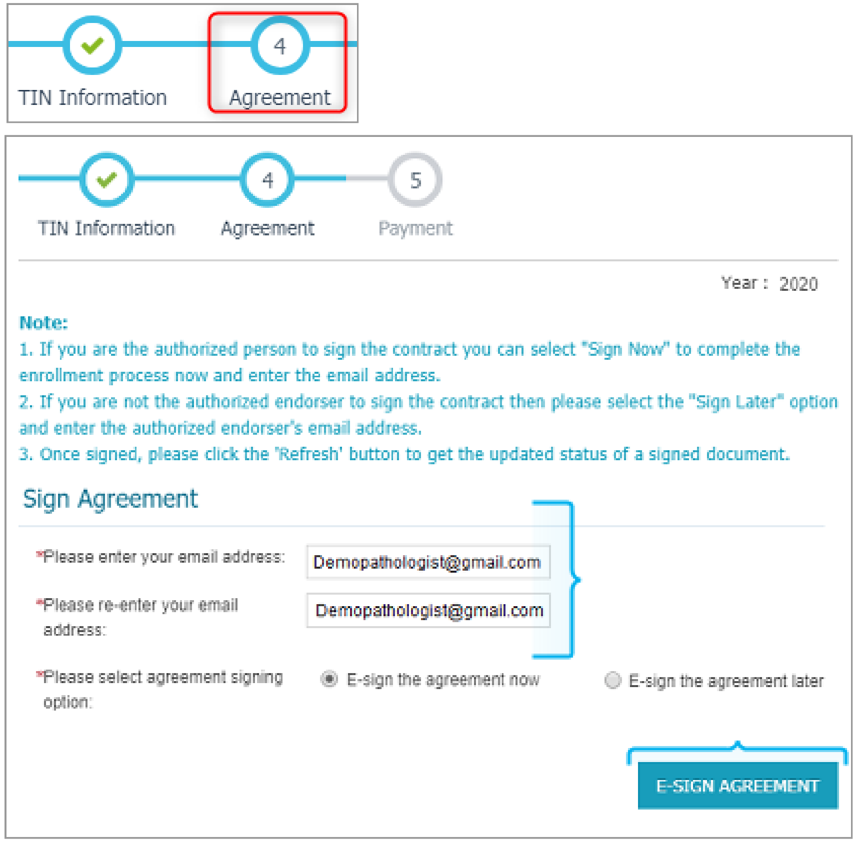


Figure 11: Agreement Page

Key Points

- Signing Option:
  - E-sign now - Allows signing through the enrollment portal
    - Select this option if you are the authorized signatory to sign the agreement.
  - E-sign Later - Allows signing the agreement later via a link sent to the registered email address.
    - Select this option if you are NOT the authorized signatory or would like to sign the agreement later.
- After the agreement is signed its status changes to 'Signed'.
- Use download icon to download the signed agreement.
- IMPORTANT: Any deviation from the online agreement signing process (such as signing a paper agreement) will significantly delay enrollment. In some cases, up to a month or more.

Action Required:

1. Enter a valid email address (Figure **11**).
2. Select the e-signing option Sign Now or Sign Later.
3. Click **E-SIGN AGREEMENT**.
   Agreement in PDF opens.

3.4.1. Sign Now

Figure 12: Checkbox to Initiate E-Signature

1. Select the checkbox to give your consent for electronically signing the agreement (Figure **12**).
   This enables the CONTINUE button located to the top right corner of the screen.

Figure 13: Continue Button in the Agreement

2. Click **CONTINUE** (Figure **13**).
   You are forwarded to the START button.

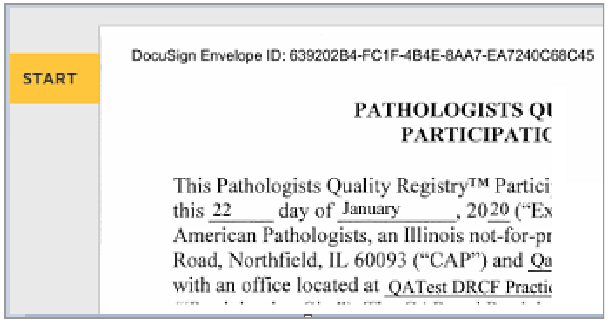


Figure 14: Start Button in the Agreement

3. Click **START** (Figure **14**).
   You are forwarded to the signature field.

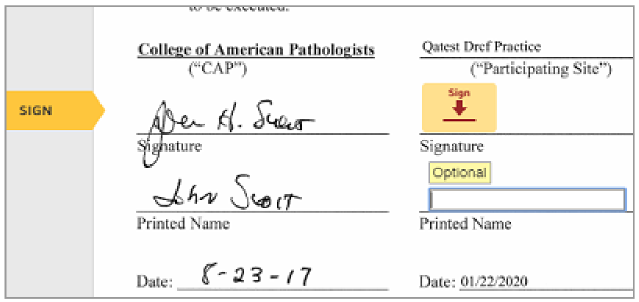


Figure 15: SIGN Button in the Agreement

4. Click **SIGN**(Figure **15**).
   Adopt Your Signature window opens.

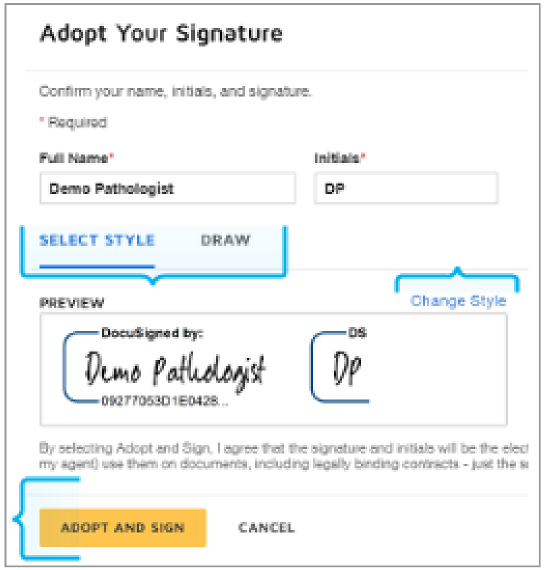


Figure 16: Adopt Your Signature Window

5. Click **SELECT STYLE** to adopt one of the predefined signature styles or (Figure **16**)
   Click **Change Style** to select another signature style
   or
   Click **DRAW** to electronically draw your signature.

6. Select the desired signature style or draw the signature.

7. Click **ADOPT AND SIGN**.
   The adopted signature is displayed in the signature field.

Figure 17: Finish Button in the Agreement

8. Click **FINISH** (Figure **17**).
   A success message is displayed with a button to download the signed agreement.

Figure 17A: Success Message Post Signing the Agreement

9. A thank you message is displayed upon successful completion
   Click **FINISH** to close the window.

Signing Option	Created On	Email Address	Status	Signed On	Sign Now	Sign Later	Download
E-Sign Through Mail	01/01/2020	demopathologist@gmail.com	Signed	01/01/2020	Not Applicable	Not Applicable	

REFRESH

Figure 18: Refresh Button on Agreement Page

10. Click **REFRESH** to update the agreement table.
    The status of the agreement will change to Signed (Figure **18**).

    Note: Practice must click on **Refresh** in order to move to the next milestone

3.4.2. Sign Later

A message requesting you to check the inbox of your email address displays after you select the sign later option.

Figure 19: Message to Visit Email Inbox

1. Click **OK** (Figure **19**).

Figure 20: Subject Line for Agreement

2. Check your inbox for an email with subject line “CAP Pathologists Quality Registry Agreement” (Figure **20**).

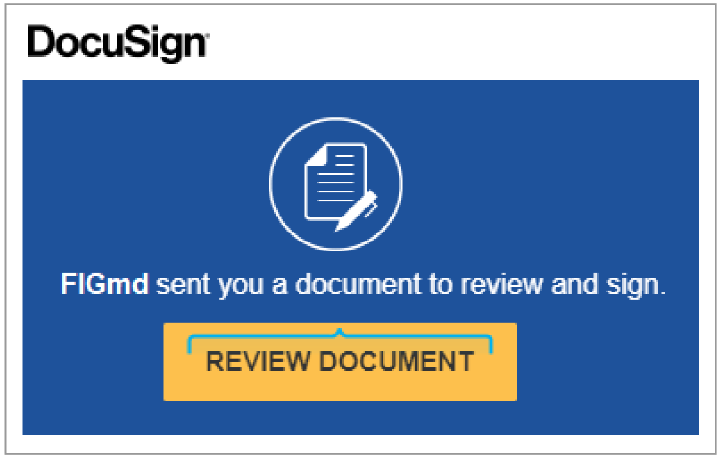


Figure 21: Link to Access Agreement

3. Click **REVIEW DOCUMENT** (Figure **21**).
   The agreement opens in PDF.

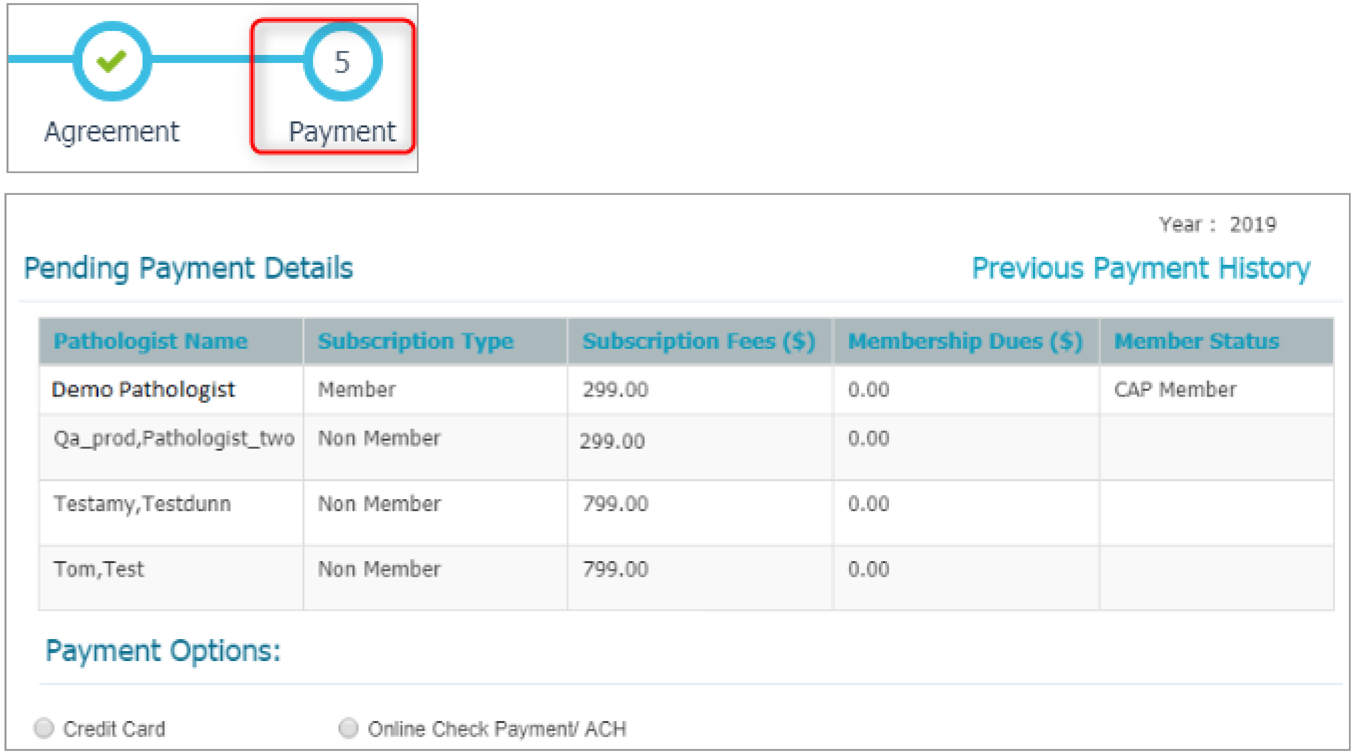
4. Follow steps **1 to 10** mentioned in Sign Now to sign the agreement.

3.5. Payment

This is the last step in the enrollment process. In this step the practice administrator can process payments for all of the pathologists within the practice (Figure **22**).

The dashboard displays two elements:

- Pending Payment Details (top left)
- Previous Payment History (top right)

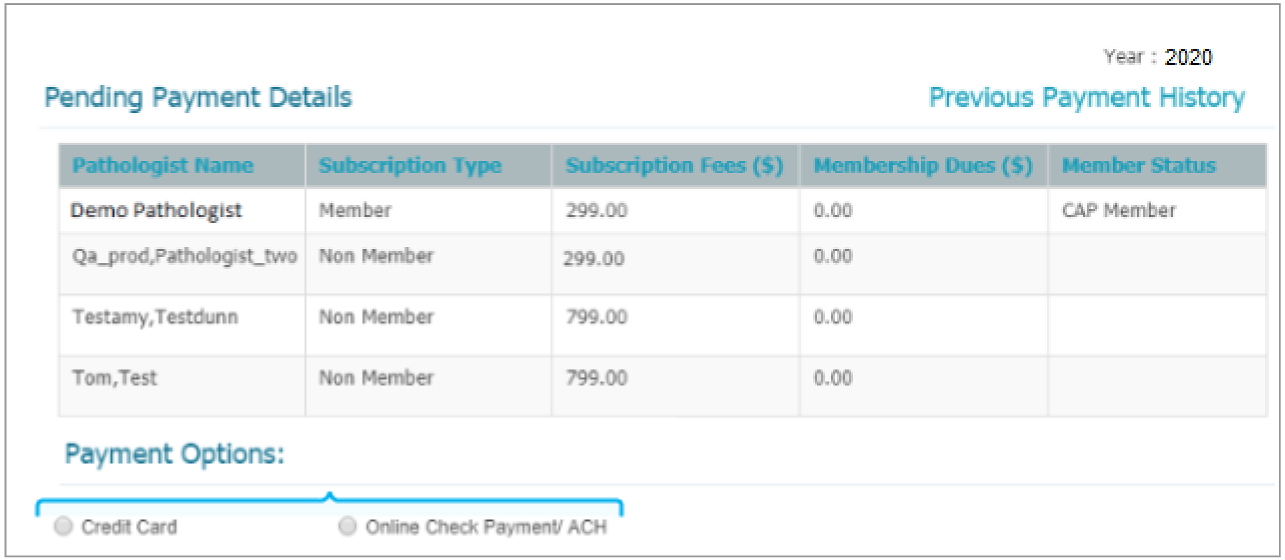


Pathologist Name	Subscription Type	Subscription Fees ($)	Membership Dues ($)	Member Status
Demo Pathologist	Member	299.00	0.00	CAP Member
Qa_prod,Pathologist_two	Non Member	299.00	0.00	
Testamy,Testdunn	Non Member	799.00	0.00	
Tom,Test	Non Member	799.00	0.00	

Figure 22: Payment Page

3.5.1. Pending Payment Details

The Pending Payment Details Table lists Pathologists and their subscription (enrollment) fees and their CAP membership status (Figure **23**).



Year : 2020

Pending Payment Details

Previous Payment History

Pathologist Name	Subscription Type	Subscription Fees ($)	Membership Dues ($)	Member Status
Demo Pathologist	Member	299.00	0.00	CAP Member
Qa_prod,Pathologist_two	Non Member	299.00	0.00	
Testamy,Testdunn	Non Member	799.00	0.00	
Tom,Test	Non Member	799.00	0.00	

Payment Options:

Credit Card

Online Check Payment/ ACH

Figure 23: Pending Payment Details Page

Key Points

- Subscription Fees ($): is CAP Pathologists Quality Registry enrollment fees
- Membership Status : is CAP membership status at the time of enrollment.Status CAP Member, Pending Member or Non-member will display.
- CAP members have lower enrollment fees.
  - For CAP members: $ 299
  - For non-CAP members: $ 799
- If pathologists would like to renew their CAP Membership or join the CAP, DO NOT PROCEED FURTHER in the enrollment portal. Contact the CAP Membership Team at Membership@cap.org for assistance in renewing or joining the CAP.
- For Returning Practices, the table displays List of Pathologists (newly and previously added) with pending payments for the current enrollment year.

3.5.1.1. Payment Option

The Practice Admin can make payment using either of the two payment options - credit card and electronic check payment/ACH.

- IMPORTANT: Any deviation from the online payment process of paying by credit card or electronic check payment/ACH (such as paying by paper check) will significantly delay enrollment. In some cases, up to a month or more.

3.5.1.1.1. Card Payment

Credit cards enable you to fufill the pending payment instantaneously.

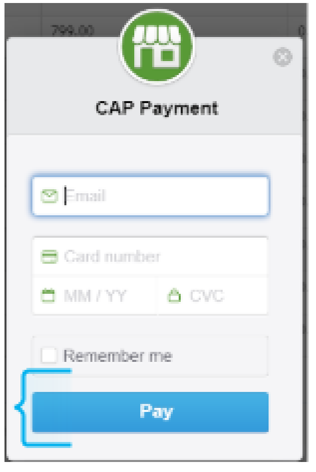


Figure 24: Card Payment Window

Key Points

- Upon successful payment processing, a success message is displayed on the screen.
- Upon completion of payment, the payment status is updated in the Pathologist Information table present in the **Pathologist & Location** page.
- Upon successful processing of the payment, an email is sent to the Pathologist/Practice Admin at the registered email address with instructions to download the receipt PDF (Figure **25, 26**).

Action Required:

1. Select the **Credit Card** radio button (Figure **23**).
   The **CAP Payment** gateway opens.

2. Enter all the mandatory details i.e. your **Email ID, Card Number, Expiration Date** and the **CVC code** to complete the payment process (Figure **24**).
   Select **Remember Me** checkbox to save your card details for future reference.

3. Click on the **Pay** button to process the transaction.
   The blue **Pay** button changes to green with a check mark indicating a successful payment transaction

Thank you for your participation in the College of American Pathologists (CAP) Pathologists Quality Registry and for showing your commitment to excellence in patient care. We appreciate your continued engagement to advance and advocate for the practice of pathology, bringing pathologists to the forefront of health care.

Your payment has been successfully processed. Below is your receipt information for Qa_demo_practice_cc_active001, Practice ID: 581994

Receipt Number :	ch_1E6YsIGQta6OuZl8XT9ryijo
Transaction Date :	02-22-2019
Amount Paid :	$ 3,608.75
Number of Pathologist(s) :	5
Payment Mode :	Credit Card
Payment Status :	Processed

Figure 25: Receipt of the Payment

COLLEGE of AMERICAN PATHOLOGISTS
Pathologists Quality Registry

College of American Pathologists—Pathologists Quality Registry Enrollment Receipt

Thank you for enrolling in CAP's Pathologists Quality Registry and for showing your commitment to excellence in patient care. We appreciate your continued engagement to advance and advocate for the practice of pathology, bringing pathologists to the forefront of health care.

Your payment has been successfully processed for the year 2019.
Payment validity period from 01/01/2019 to 12/31/2019.

Receipt Number :	ch_1E6YsIGQta6OuZl8XT9ryijo
Payment Received Date :	02-22-2019
Amount Paid :	3,608.75
Number of Pathologist(s) :	5
Practice Name :	Qa_demo_practice_cc_active001
Payment Mode :	Credit Card
Payment Status :	Processed

Payment Details:

Sr. No	Pathologist Name	CAP Member ID	CAP Membership Status	Subscription Fees	Membership Dues	Total Fee
1	Qa Demo,Test Six		Non Member	799.00	0.00	799.00
2	Qa Demo,Test Nine		Non Member	799.00	0.00	799.00
3	Qa Demo,Testeight		Non Member	799.00	0.00	799.00
4	Patricia,Tsang	700195	Non Member	799.00	0.00	799.00
5	Qa Demo,Qa Seven		Pending Member	299.00	113.75	412.75
						Total Payment Received: $3608.75

Please save this receipt for future reference.

Regards,
College of American Pathologists, Pathologists Quality Registry Support Team
1-800-323-4040 Option 3
registry.support@cap.org

Figure 26: PDF of Payment Receipt

3.5.1.1.2. Online Check Payment/ACH

Online check payments are processed in 2-3 working days.

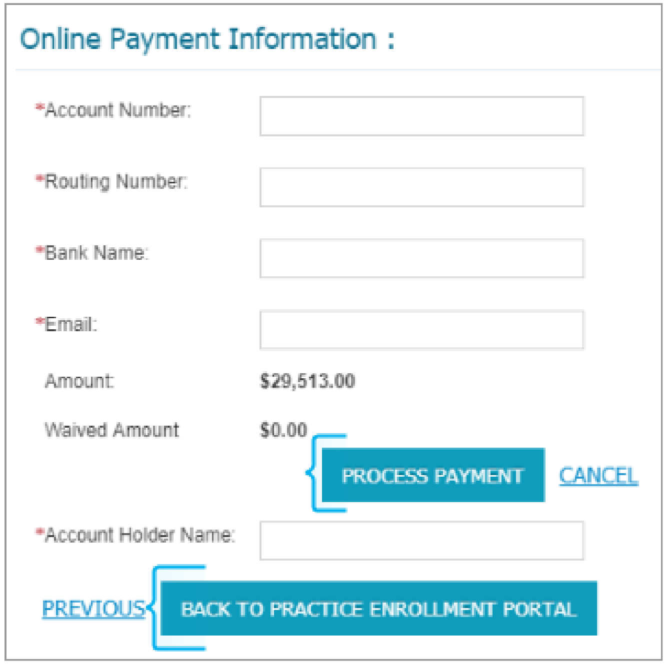


Figure 27: Online Check Payment Window

Key Points

- The practice admin is emailed the status of payment processing:
  - An email is sent to the practice admin on initiating the payment processing(Figure **28**).
  - A second email containing the payment receipt is sent to the user within 7 days to confirm the payment completion (Figure **29**).

Action Required:

1. Select **Online Check Payment/ACH** (Figure **23**).
   Online Payment Information window opens.
2. Enter details in the mandatory fields (Figure **27**).
   The amount due is displayed at the bottom.
3. Click **PROCESS PAYMENT** to initiate the payment process.
4. Click **BACK TO PRACTICE ENROLLMENT PORTAL** to navigate to the Practice Enrollment Portal.

Thank you for your participation in the College of American Pathologists (CAP) Pathologists Quality Registry and for showing your commitment to excellence in patient care. We appreciate your continued engagement to advance and advocate for the practice of pathology, bringing pathologists to the forefront of health care.

Thank you for your payment. It has been submitted successfully.
Below is your transaction information:

Transaction Number :	60114367971
Transaction Date :	12-28-2018
Amount Paid :	$ 1,852.00
Number Of Pathologist(s) :	3
Payment Mode :	ONLINE CHECK PAYMENT
Payment Status :	Waiting for Ack from Bank

Figure 28: E-mail For ACH (Waiting for Acknowledgement from the bank)

Thank you for your participation in the College of American Pathologists (CAP) Pathologists Quality Registry and for showing your commitment to excellence in patient care. We appreciate your continued engagement to advance and advocate for the practice of pathology, bringing pathologists to the forefront of health care.

Thank you for your payment. It has been submitted successfully.
Below is your transaction information:

Transaction Number :	60116875970
Transaction Date :	02-20-2019
Amount Paid :	$ 1098.00
Number Of Pathologist(s) :	2
Payment Mode :	ONLINE CHECK PAYMENT
Payment Status :	Processed

Figure 29: E-mail For ACH (Payment Processed)

3.5.2. Previous Payment History

This option displays the previous payment details of the practice in a table.

Previous Payment Transactions:

Transaction #	Amount Paid	Transaction Date	Number of Pathologists	Payment Status	Payment Mode	Download Receipt
55555555555	299.00	08-14-2017	1	Processed	Online Check Payment	
99999999999	799.00	08-14-2017	1	Processed	Credit Card	

Total Records: 2

Figure 30: Previous Payment History Table

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College Of American Pathologists Pathologists Quality Registry Enrollment Receipt

Thank you for enrolling in CAP's Pathologists Quality Registry and for showing your commitment to excellence in patient care. We appreciate your continued engagement to advance and advocate for the practice of pathology, bringing pathologists to the forefront of health care.

Your payment has been successfully processed.

Receipt Number :	ch_1B6yc8FhtxY0WKkUUXkLT8do
Received Date :	09-28-2017
Amount Paid :	$799.00
Number of Pathologist(s) :	1
Practice Name :	Testpract
Payment Mode :	Credit Card
Payment Status :	Processed

Payment Details:

Sr.No	Pathologist Name	CAP Member ID	CAP Membership Status	Subscription Fees	Membership Dues	Total Fee
1	Provider,Test		Non Member	799.00	0.00	799.00

Total Payment Received: $799.00

Please save this receipt for future reference.

Regards,
The Pathologists Quality Registry Support Team
1-800-323-4040 Option 3
registry.support@cap.org

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Figure 31: Payment Receipt

Key Points

- Upon successful payment processing, the payment status of the pathologists changes from Unpaid to Paid.
- The corresponding practice becomes active.

Action Required:

1. Click the **Previous Payment History** (Figure **23**).
2. Make payment.
3. Upon completion of payment, click the **download** icon to download the payment receipt PDF (Figure **30**).

4. Login Functions

This section covers processes that are common to both new and returning users. The common functions include:

- Creating a CAP web account
- Enrolling a Practice
- Updating Contact Information

4.1. Create An Account

This option enables new users to create a CAP Web Account. The account creation involves entering in information at three key steps: Login Details, Personal Details, Contact Details. The last step displays a success or failure message based on the result.

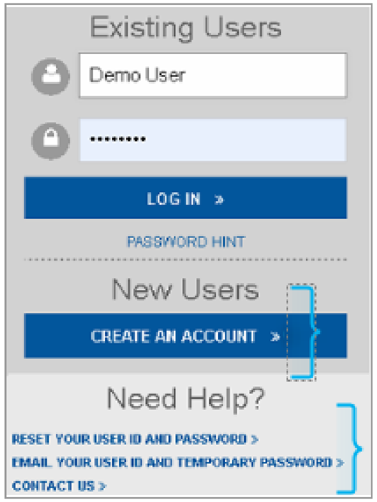

Figure 32: Login Window

Key Points

A CAP Web Account is needed to:

- Access the Practice Enrollment Portal
- Access the Practice Dashboard in the Registry. Depending on the role of user, rights within the Registry may be limited.
- If a user suspects they have a CAP account from a previous practice/organization, do not create a new account. Email contactcenter@cap.org for assistance in retrieving/updating user account information.

Action Required:

1. Click **CREATE AN ACCOUNT** on the login page (Figure **32**).
   CREATE A WEB ACCOUNT page opens.

4.1.1. Login Details

The Login Details step enables you to create login credentials to access the portal.

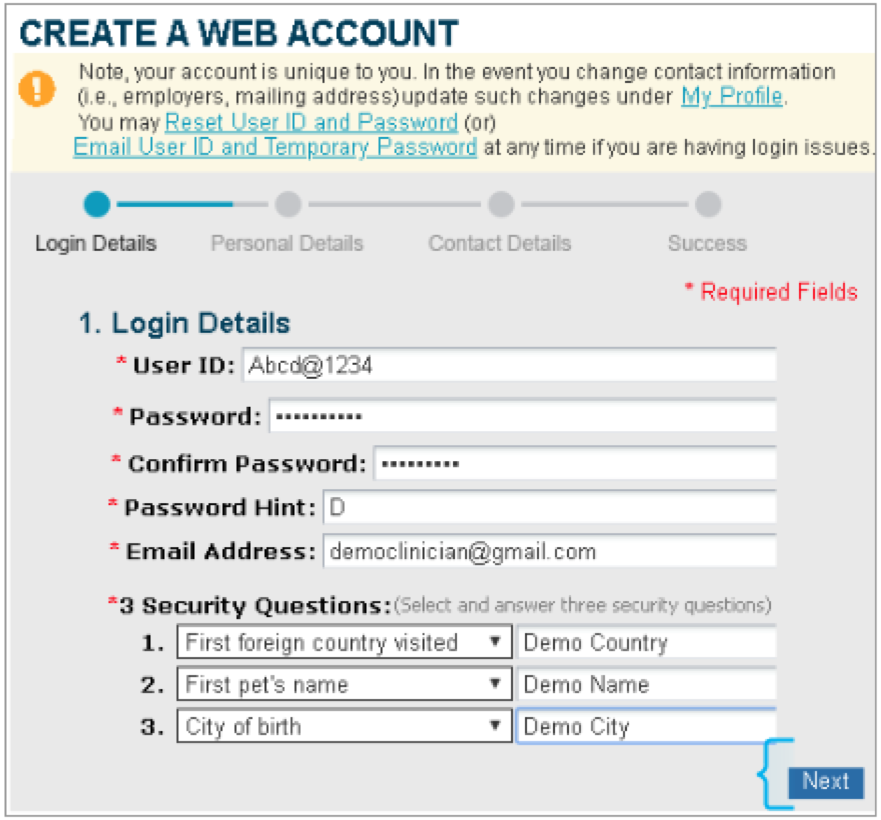

Figure 33: Login Details Window

Key Points

First Step-Login Details

- Enter/select the following:
  - User ID and Password
  - Ensure that credentials fulfil the required criteria
  - Security questions from the drop-down.

If you need any help with creating your CAP web account, contact the CAP Contact Center at 800-323-4040, or via email at contactcenter@cap.org.

Action Required:

1. Enter required data in the given fields to create login credentials (Figure **33**).
2. Click **Next**.
   Personal Details page opens.

4.1.2. Personal Details

This step captures your personal information.

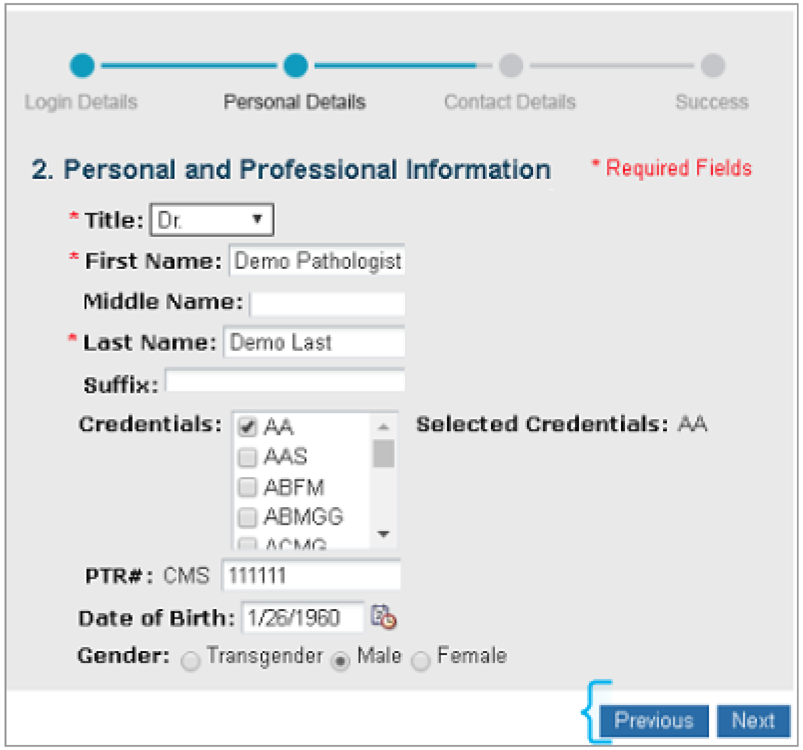

Figure 34: Personal Details Window

Key Points

- Use drop-down to select your title and credentials.
- PTR # : is the PAP Proficiency Testing (PT) assigned registration number for examinees who tested in the past.
- Use calendar to select the date of birth.
- The steps are accessible in sequential order.

Action Required

3. Enter the required information (Figure **34**).
4. Click **Next** to move to the following step and **Previous** to navigate to the prior step.

4.1.3. Contact Details

This step captures details required to reach you.

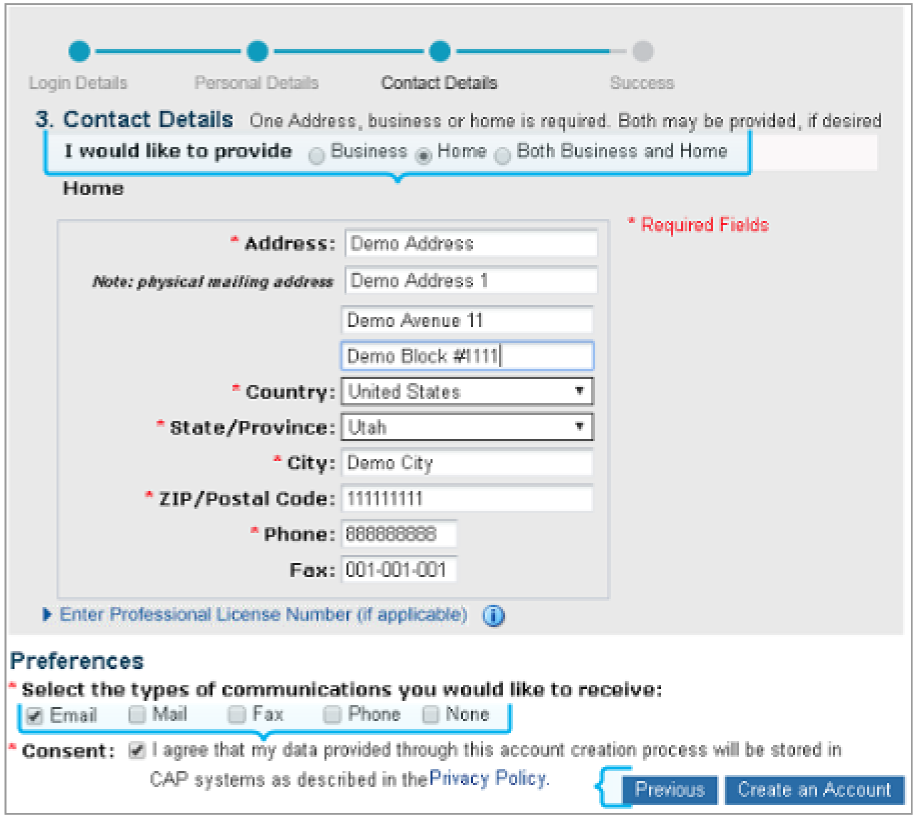

Figure 35: Contact Details Window

- Click **Previous** to move to the prior step.

Action Required:

To receive communications about the Registry,

5. Select the desired option using the radio button (Figure **35**).

6. Select checkbox for the preferred communication mode
7. Click the checkbox to consent to storing your personal information in the Registry.
8. Click **Create an Account**.

4.1.4. Success

This is the last step displaying a success message on creating a CAP Web Account (Figure **36**).

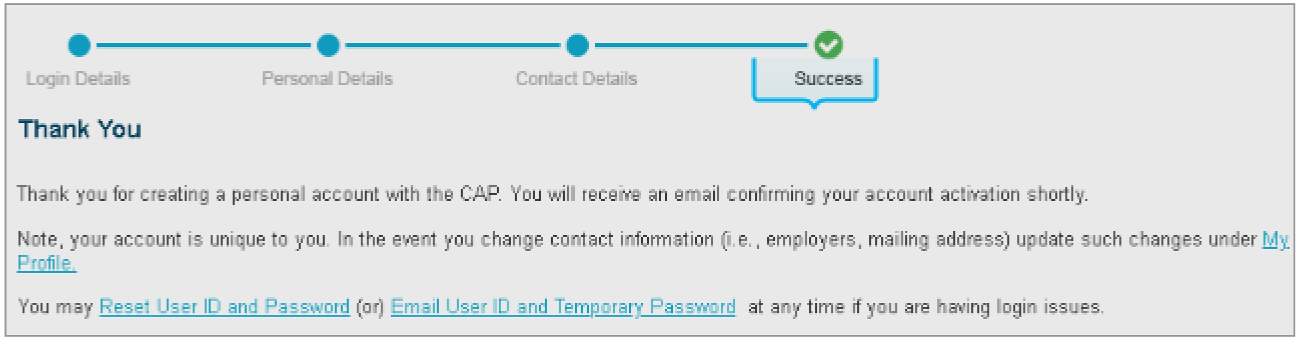

Figure 36: Success Message

NOTE: If you receive an email stating your account activation will be delayed several days, there may be an issue with your account (suspected duplicate, or other issue), please contact the **CAP Contact Center 800-323-4040**, or via email at contactcenter@cap.org.

Key Points

- This step displays a green checkmark upon successful creation of an account.
- Registry gets back to the Practice Admin indicating that the account is active.
- Click **Reset User ID and Password** or **Email User ID and Temporary Password** if you have any login issues.
- Click **My Profile** link to update your contact information.

4.2. Portal Access

Enrollment portal is accessible to new and returning users only after successful login.

4.2.1. Login

The login window is a gateway to the Practice Enrollment Portal. It captures your login credentials to verify the authenticity.

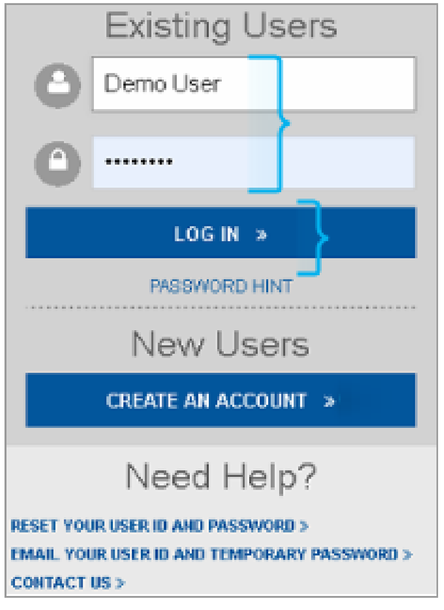

Figure 37: Login Window

Action Required:

1. Enter User name and password (Figure **37**).
2. Click **LOG IN**.
   Successful login displays Practice Enrollment Portal.

4.2.2. Reset User ID and Password

The functionality enables you to reset your login credentials.

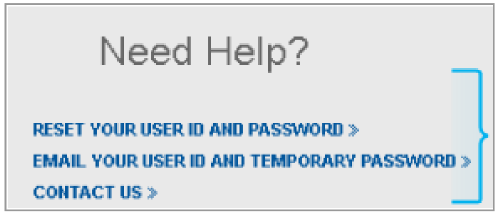

Figure 38: Need Help Window

Figure 39: Reset ID and Password Window

Key Points

- The security questions you had chosen while creating the credentials are displayed here.
- Enter an email where you would prefer to receive the link to recreate login credentials.

Action Required:

1. Click **RESET YOUR USER ID AND PASSWORD** (Figure **38**).
2. Answer the security questions (Figure **39**).
   Reset Your User ID and Password window opens.
3. Enter your last name and a valid email address.
   A link to reset your login credentials will be sent to your email address.
4. Click **Submit**.

5. Click the link to reset your login credentials.

6. Enter User ID and Password

7. Click **OK**.

4.2.3. Receive Temporary Password

This functionality will generate a temporary password to access the portal if you are not able to login using the current password.

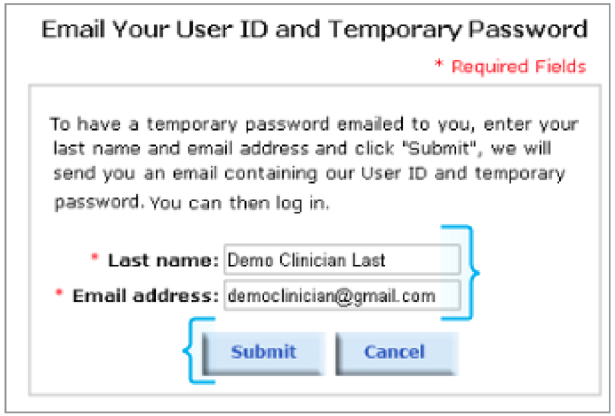

Figure 40: Reset Temporary Password

Key Points

Receive a temporary password, if you have forgotten the password.

Action Required:

1. Click **EMAIL YOUR USER ID AND TEMPORARY PASSWORD** link (Figure **38**).
   Email Your User ID and Temporary Password window opens.

2. Enter your last name and a valid email address (Figure **39**).

3. Click **Submit**.

4. Check the inbox for the temporary password.

5. Acronyms and Abbreviations

MIPS	Merit Based Incentive Payment System
NPI	National Provider Identifier
TIN	Tax Identification Number
ACH	Automated Clearing House

6. Contact Us

For more information or to submit comments or questions, click on the [**CONTACT US**]() link on the login page (Figure **37**).

This displays contact information about (Figure **38**):

- Locations and corresponding contact details
- Hours of operation
- System requirements

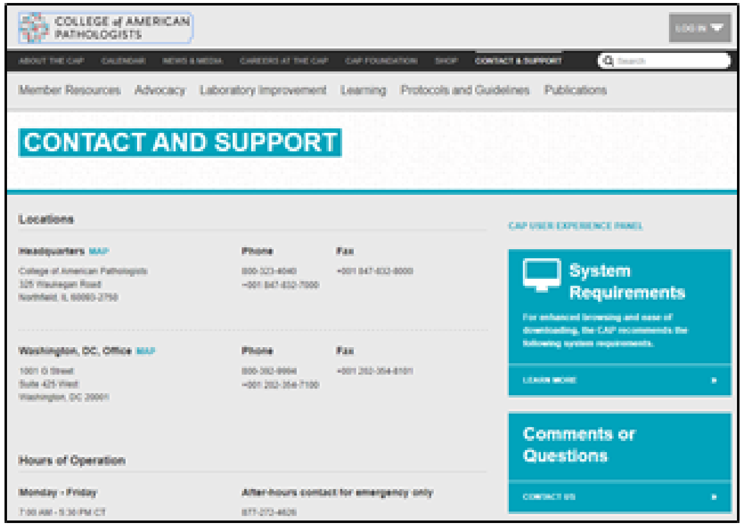

Figure 41: Contact and Support