

# Guide for Completing EIDM Account setup for Migrating IACS Users

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## I. Introduction

This guide is for users who have an Individuals Authorized Access to the CMS Computer Services (IACS) account with a Physician Value – Physician Quality Reporting System (PV-PQRS) role. This guide provides step-by-step instructions on how users can sign up for an Enterprise Identity Data Management (EIDM) account in order to access the ‘Physician Quality and Value Programs’ application in the CMS Enterprise Portal.

**Note:** Do not use this guide (1) if you already have an EIDM account or (2) if you do not have an IACS account with a PV-PQRS role. Please visit <http://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/PhysicianFeedbackProgram/Obtain-2013-QRUR.html> to determine which guide you should use based on your needs.

By July 13, 2015, users with existing IACS accounts will be migrated to the EIDM. Please follow the instructions in this guide in order to sign up for an EIDM account through the CMS Enterprise Portal. Depending on the role you had in IACS, you will be allowed to perform the same tasks in the CMS Enterprise Portal that you were able to perform with your IACS account.

- **Security Official role:** The Security Official role in the EIDM allows the user to perform the following tasks on behalf of a group practice:
  - Register the group practice to participate in the Physician Quality Reporting System (PQRS) Group Practice Reporting Option (GPRO);
  - Obtain the group practice’s Mid-Year and Annual Quality and Resource User Report (QRUR), Supplemental QRUR, and PQRS Feedback Report;
  - Submit an informal review request on behalf of the group practice; and
  - Approve requests for the ‘Group Representative’ role in the EIDM.
- **Group Representative role:** The Group Representative role in the EIDM allows the user to perform the following tasks on behalf of a group practice:
  - Register the group practice to participate in the PQRS GPRO;
  - Obtain the group practice’s Mid-Year and Annual QRUR, Supplemental QRUR, and PQRS Feedback Report; and
  - Submit an informal review request on behalf of the group practice.
- **Individual Practitioner role:** The Individual Practitioner role in the EIDM allows the user to perform the following tasks on behalf of a solo practitioner:
  - Obtain the solo practitioner’s Mid-Year and Annual QRUR, Supplemental QRUR, and PQRS Feedback Report; and
  - Approve requests for the ‘Individual Practitioner Representative’ role in the EIDM.
- **Individual Practitioner Representative role:** The Individual Representative role in the EIDM allows the user to perform the following task on behalf of the solo practitioner:
  - Obtain a solo practitioner’s Mid-Year and Annual QRUR, Supplemental QRUR and PQRS Feedback Report.

Information about registering to participate in the PQRS GPRO and obtaining QRURs is available at <http://www.cms.gov/PhysicianFeedbackProgram>.

**If you have questions about the or need assistance accessing any of the reports, please contact the QualityNet Help Desk by phone at 866-288-8912. Normal business hours are Monday-Friday from 8 am to 8 pm EST**

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**Step-by-Step Instructions:** You have **twenty-five (25) minutes** to complete each screen (unless a different time is noted on the screen). Otherwise, you will lose all of the information you filled in and will need to start the process again.

## **II. Questions**

For questions about setting up an EIDM account, please contact the QualityNet Help Desk at:

- Monday – Friday: 8:00 am – 8:00 pm EST
- Phone: (866) 288-8912 (TTY 1-877-715-6222)
- Email: [qnetssupport@hcqis.org](mailto:qnetssupport@hcqis.org)

For additional information on how to complete the EIDM account setup for the users migrating from the IACS to access the ‘Physician Quality and Value Programs’ application using the EIDM, please

visit <http://www.cms.gov/Medicare/Medicare-Fee-For-Service-Payment/PhysicianFeedbackProgram/Obtain-2013-QRUR.html>.

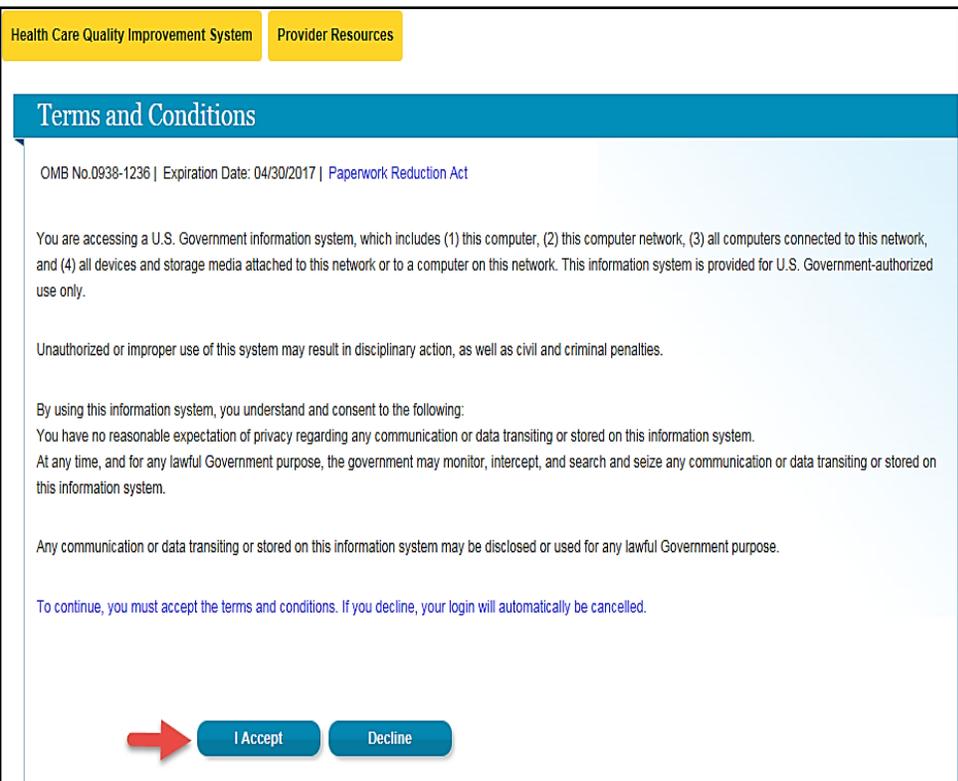
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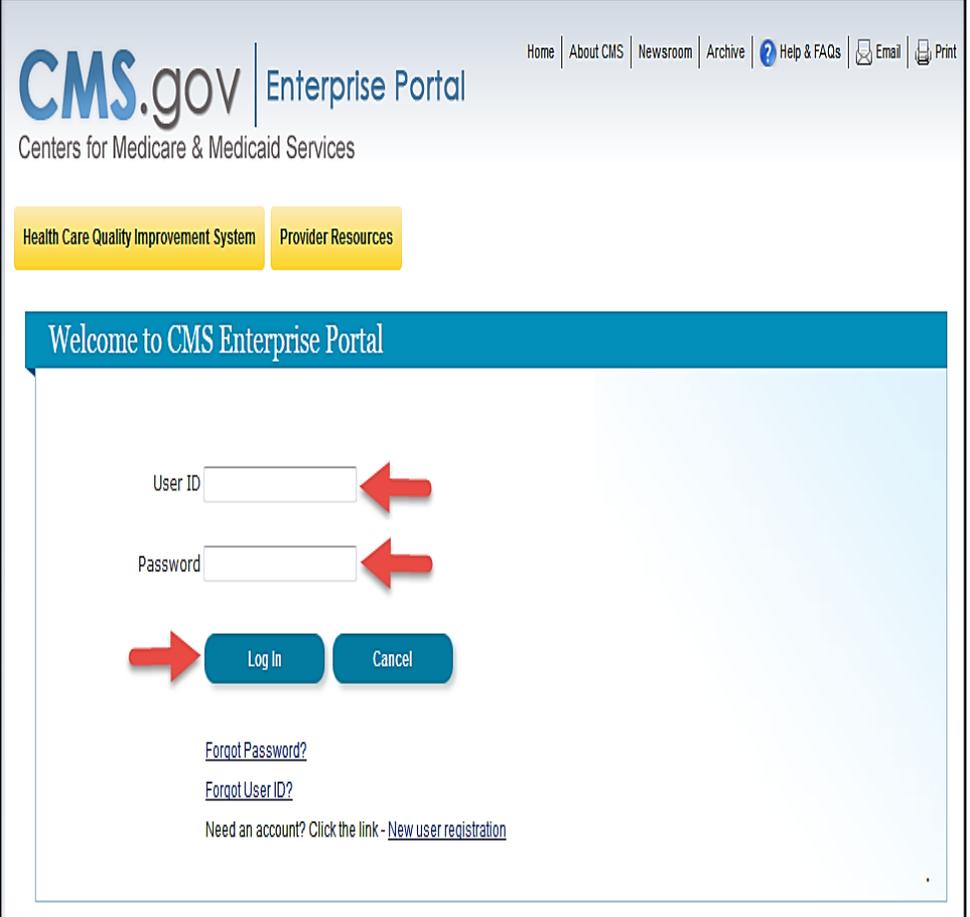
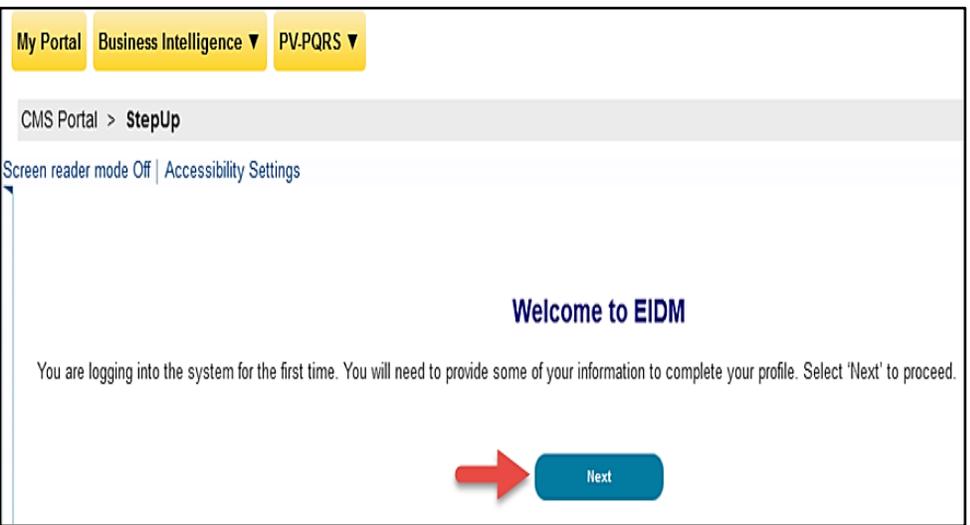
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## IV. Setting-up an EIDM Account for Migrated IACS User – Please follow each step listed below unless otherwise noted.

Steps	Screenshots
<p>1. Go to <a href="https://portal.cms.gov">https://portal.cms.gov</a> and select <b>Login to CMS Secure Portal</b>.</p> <p><b>Note:</b> The CMS Enterprise Portal supports the following internet browsers:</p> <ul style="list-style-type: none"> <li>• Internet Explorer 8 (without compatibility mode)</li> <li>• Internet Explorer 9 (without compatibility mode)</li> <li>• Internet Explorer 10 (without compatibility mode)</li> <li>• Mozilla-Firefox</li> <li>• Chrome</li> <li>• Safari</li> </ul> <p>Enable JavaScript and adjust any zoom features to ensure you are not seeing the screen in too wide of a view.</p>	
<p>2. Read the <b>Terms and Conditions</b> and select <b>I Accept to continue</b>.</p>	

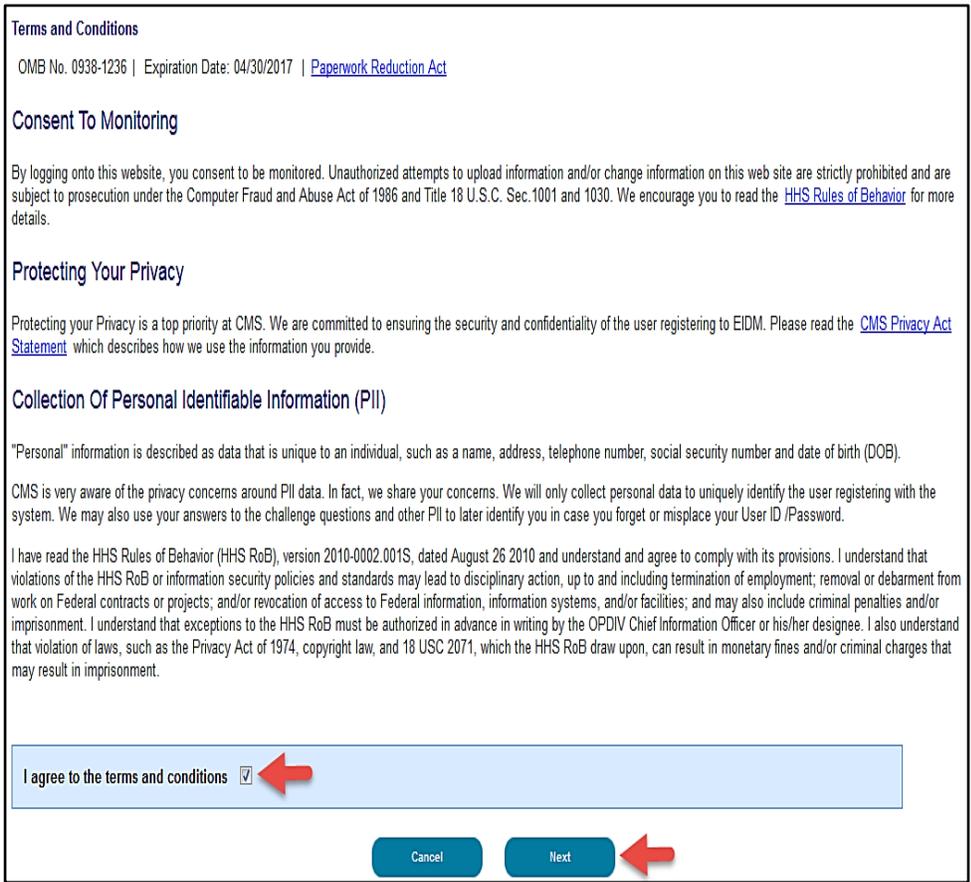
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Steps	Screenshots
<p>3. Enter the following Information and select <b>Log In</b>:</p> <ul style="list-style-type: none"><li>○ IACS User ID</li><li>○ IACS Password</li></ul> <p><b>Note:</b> <i>If your password is less than eight (8) characters in IACS, then a new password will be assigned. The new password will be upper case of first letter of last name, lowercase second letter of last name and last six (6) digits of your Social Security Number.</i></p>	
<p>4. Select <b>Next</b> on the <b>Welcome to EIDM</b> screen to begin creating your EIDM account.</p>	

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Steps	Screenshots
<p>5. Read the <b>Terms and Conditions</b>. Select the <b><i>I agree to the terms and conditions</i></b> checkbox and select <b><i>Next</i></b>.</p> <p><b>Note:</b> <i>Next</i> will be enabled only after checking the <b><i>I agree to the terms and conditions</i></b> checkbox.</p>	 <p><b>Terms and Conditions</b> OMB No. 0938-1236   Expiration Date: 04/30/2017   <a href="#">Paperwork Reduction Act</a></p> <p><b>Consent To Monitoring</b> By logging onto this website, you consent to be monitored. Unauthorized attempts to upload information and/or change information on this web site are strictly prohibited and are subject to prosecution under the Computer Fraud and Abuse Act of 1986 and Title 18 U.S.C. Sec.1001 and 1030. We encourage you to read the <a href="#">HHS Rules of Behavior</a> for more details.</p> <p><b>Protecting Your Privacy</b> Protecting your Privacy is a top priority at CMS. We are committed to ensuring the security and confidentiality of the user registering to EIDM. Please read the <a href="#">CMS Privacy Act Statement</a> which describes how we use the information you provide.</p> <p><b>Collection Of Personal Identifiable Information (PII)</b> "Personal" information is described as data that is unique to an individual, such as a name, address, telephone number, social security number and date of birth (DOB). CMS is very aware of the privacy concerns around PII data. In fact, we share your concerns. We will only collect personal data to uniquely identify the user registering with the system. We may also use your answers to the challenge questions and other PII to later identify you in case you forget or misplace your User ID /Password. I have read the HHS Rules of Behavior (HHS RoB), version 2010-0002.001S, dated August 26 2010 and understand and agree to comply with its provisions. I understand that violations of the HHS RoB or information security policies and standards may lead to disciplinary action, up to and including termination of employment; removal or debarment from work on Federal contracts or projects; and/or revocation of access to Federal information, information systems, and/or facilities; and may also include criminal penalties and/or imprisonment. I understand that exceptions to the HHS RoB must be authorized in advance in writing by the OPDIV Chief Information Officer or his/her designee. I also understand that violation of laws, such as the Privacy Act of 1974, copyright law, and 18 USC 2071, which the HHS RoB draw upon, can result in monetary fines and/or criminal charges that may result in imprisonment.</p> <p>I agree to the terms and conditions <input checked="" type="checkbox"/> </p> <p><input type="button" value="Cancel"/> <input type="button" value="Next"/> </p>

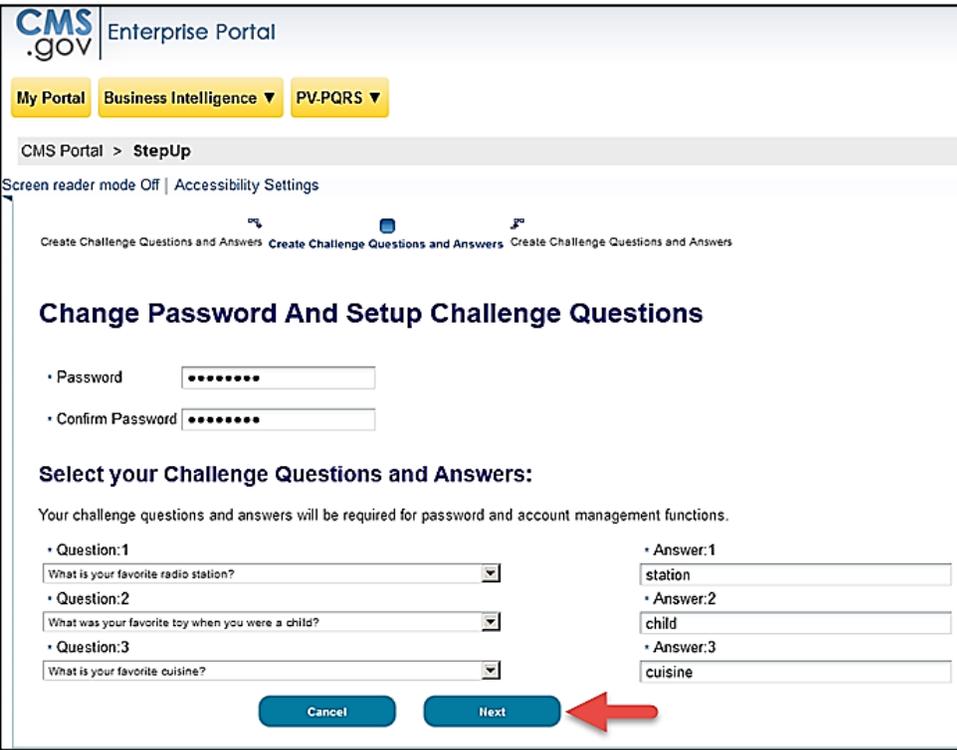
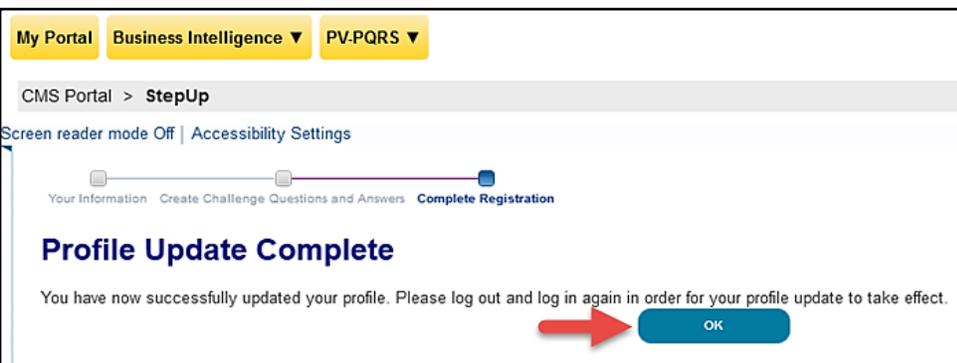
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Steps	Screenshots
<p>6. In the <b>Your Information</b> section, the following fields will be pre-populated with the corresponding information from your IACS account :</p> <ul style="list-style-type: none"> <li>○ First Name</li> <li>○ Last Name</li> <li>○ E-mail Address</li> <li>○ Confirm E-mail Address</li> <li>○ Social Security Number</li> <li>○ Date of Birth</li> </ul> <p>Review all pre-populated information and enter the following required information:</p> <ul style="list-style-type: none"> <li>○ Home Address Line 1</li> <li>○ City</li> <li>○ State</li> <li>○ Zip Code</li> <li>○ Primary Phone Number</li> </ul> <p>After all required fields are completed, select <b>Next</b>.</p> <p><b>Note:</b> <i>You will be required to add the address information associated with your account. All other information cannot be edited on this screen. However, once your EIDM account has been established, you will be able to update the email address associated with your account by navigating to the <b>Your Profile</b> screen and completing the appropriate steps.</i></p>	<div style="border: 1px solid black; padding: 10px;"> <h3 style="margin-top: 0;">Your Information</h3> <p>Enter your legal first name and last name, as it may be required for Identity Verification.</p> <p>* First Name: <input type="text" value="John"/> Middle Name: <input type="text"/></p> <p>* Last Name: <input type="text" value="Doe"/> Suffix: <input type="text" value=""/></p> <hr/> <p>Enter your E-mail address, as it will be used for account related communications.</p> <p>* E-mail Address: <input type="text" value="John.Doe@abc.com"/></p> <p>Re-enter your E-mail address.</p> <p>* Confirm E-mail Address: <input type="text" value="John.Doe@abc.com"/></p> <hr/> <p>Enter your full 9 digit social security number, as it may be required for Identity Verification.</p> <p>Social Security Number: <input type="text" value="..."/> <input type="text" value=".."/> <input type="text" value="...."/></p> <hr/> <p>Enter your date of birth in MM/DD/YYYY format, as it may be required for Identity Verification.</p> <p>* Date of Birth: <input type="text" value="01"/> <input type="text" value="01"/> <input type="text" value="1990"/></p> <hr/> <p><input checked="" type="radio"/> U.S. Home Address <input type="radio"/> Foreign address</p> <p>Enter your current or most recent home address, as it may be required for Identity Verification.</p> <p>* Home Address Line 1: <input type="text"/></p> <p>Home Address Line 2: <input type="text"/></p> <p>* City: <input type="text"/> * State: <input type="text" value=""/> * Zip Code: <input type="text"/> Zip Code Extension: <input type="text"/> Country: USA</p> <hr/> <p>Enter your primary phone number, as it may be required for Identity Verification.</p> <p>* Primary Phone Number: <input type="text"/> <input type="text"/> <input type="text"/></p> <hr/> <p style="text-align: right;"> <input type="button" value="Cancel"/> <input type="button" value="Next"/> </p> </div>

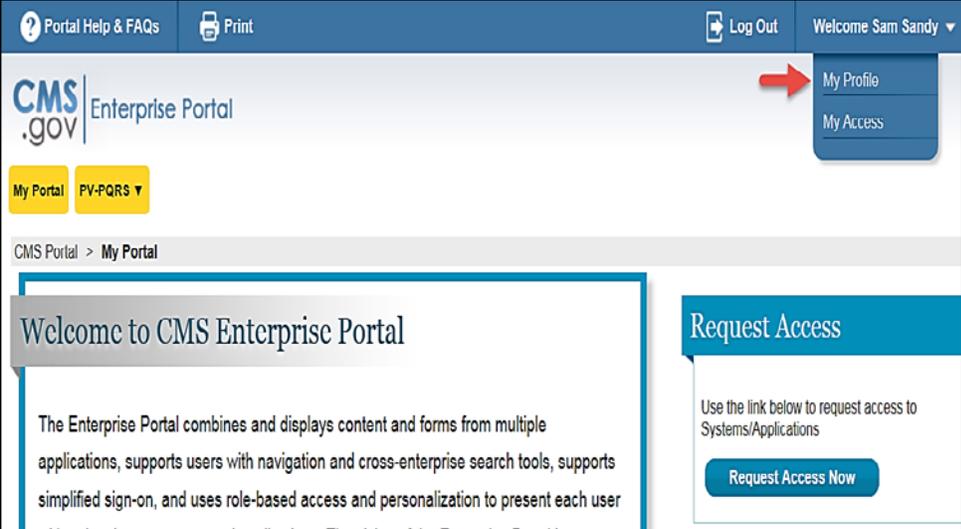
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Steps	Screenshots
<p>7. (a) Create your <b>EIDM Password</b>.</p> <p><b>Note:</b> Your EIDM Password must be a minimum of eight (8) and a maximum of twenty (20) characters in length. It must contain at least one (1) letter, one (1) number, one (1) uppercase letter, and one (1) lowercase letter. It cannot contain your User ID and the following special characters may not be used: ?, &lt;, &gt;, (, ), ', ", /,  , and &amp;. Your password must be changed at least every 60 days and can only be changed once a day."</p> <p>(b) Select and provide the answer to three (3) challenge questions under <b>Select your Challenge Questions and Answers</b> section.</p> <p>(c) Select <i>Next</i></p>	 <p>The screenshot shows the 'StepUp' page with the heading 'Change Password And Setup Challenge Questions'. It features two password input fields labeled 'Password' and 'Confirm Password'. Below these are three challenge questions with dropdown menus and corresponding answer input fields. The questions are: 'What is your favorite radio station?', 'What was your favorite toy when you were a child?', and 'What is your favorite cuisine?'. The answers provided are 'station', 'child', and 'cuisine'. At the bottom, there are 'Cancel' and 'Next' buttons, with a red arrow pointing to the 'Next' button.</p>
<p>8. Your registration for an EIDM account is now complete. You will receive an E-mail acknowledging your successful account creation with your EIDM User ID.</p> <p>Select <b>OK</b> to navigate to the CMS Enterprise Portal in order to access the <b>Physician Quality and Value Programs</b> application.</p> <p><b>Note:</b> Wait approximately five (5) minutes before logging in to the portal with your EIDM User ID and EIDM Password.</p>	 <p>The screenshot shows the 'StepUp' page with the heading 'Profile Update Complete'. A progress bar at the top indicates that 'Complete Registration' is the final step. The message reads: 'You have now successfully updated your profile. Please log out and log in again in order for your profile update to take effect.' At the bottom right, there is an 'OK' button with a red arrow pointing to it.</p>

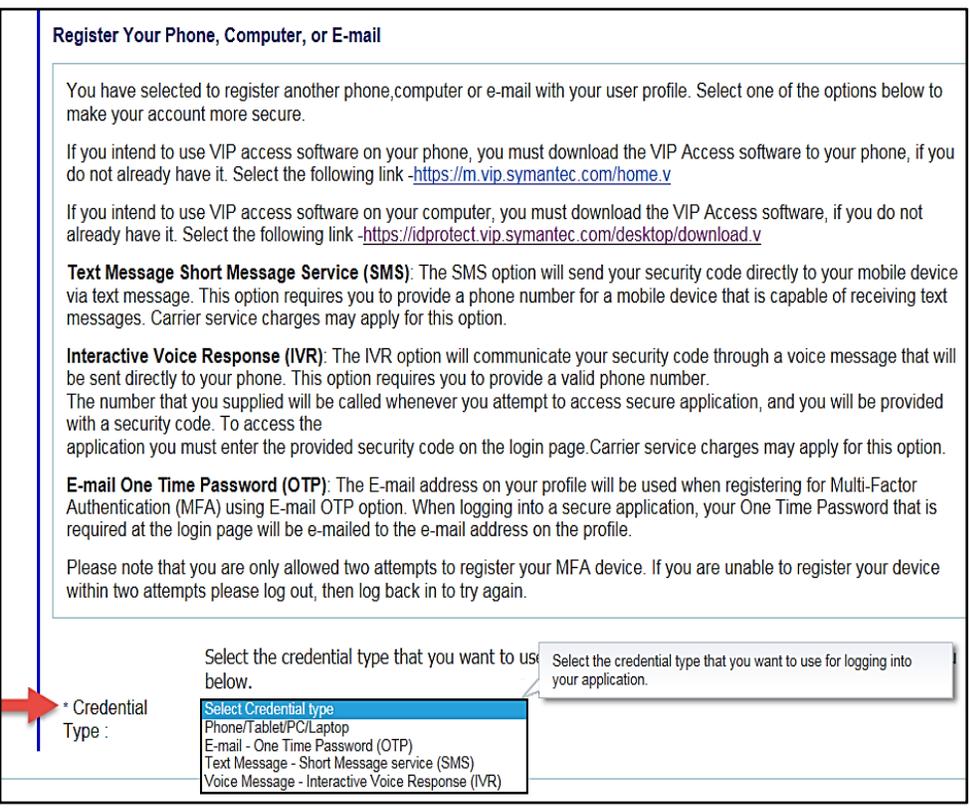
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Steps	Screenshots
<p style="text-align: center;"><b>Multi-Factor Authentication (MFA)</b></p> <p><b>Follow steps 9 to 14 to register for MFA. MFA is an approach to security authentication which requires users to provide more than one form of verification in order to prove their identity. MFA registration is required only once when you are requesting a user role, but will be verified every time you log into the CMS Enterprise Portal. Additional information on how the MFA process works can be found at <a href="http://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/PhysicianFeedbackProgram/Obtain-2013-QRUR.html">http://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/PhysicianFeedbackProgram/Obtain-2013-QRUR.html</a>.</b></p>	
<p>9. <b>Log In</b> to the <b>CMS Enterprise Portal</b>. Enter the following information and select <b>Log In</b>:</p> <ol style="list-style-type: none"> <li>a. EIDM User ID</li> <li>b. EIDM Password</li> </ol> <p><b>Note:</b> <i>Multi-Factor Authentication (MFA) is a new approach to security authentication which will help improve CMS' ability to reduce fraud and ensure system security. It requires users to provide more than one form of verification in order to prove their identity in order to access certain information provided via the 'Physician Quality and Value Programs' application.</i></p>	
<p>10. Select <b>Username</b> and then select <b>My Profile</b> from drop-down menu.</p>	

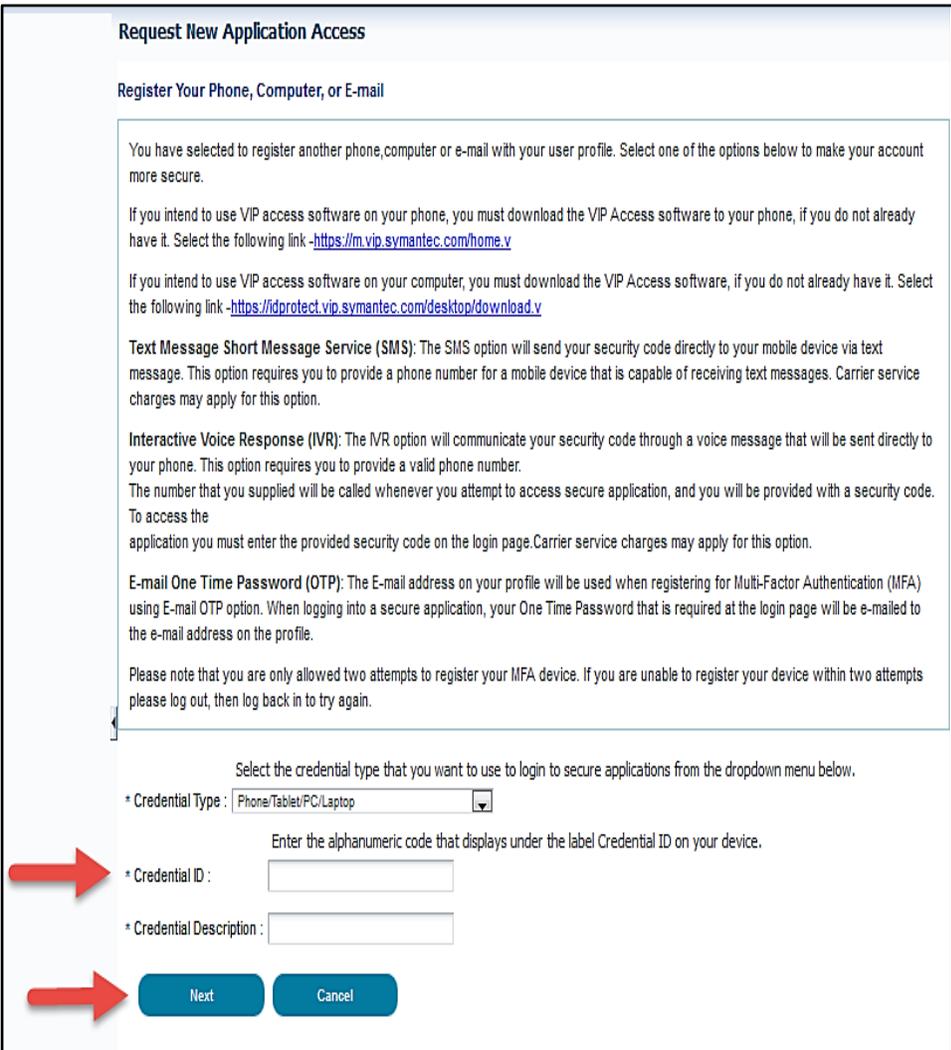
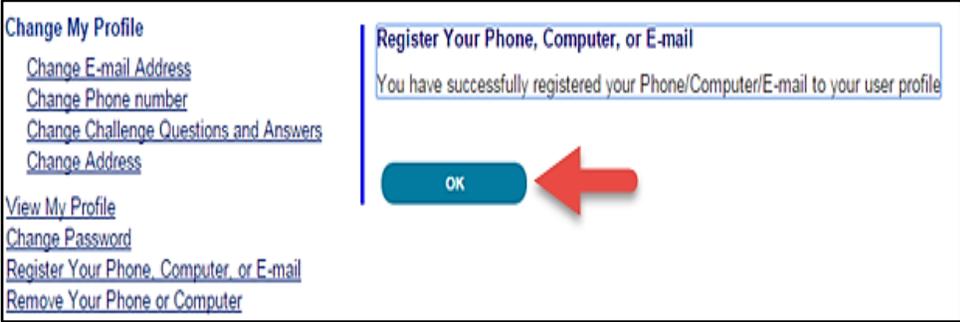
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Steps	Screenshots
<p>11. Under <b>Change My Profile</b>, select <b>Register Your Phone, Computer, or E-mail</b>.</p>	
<p>12. Read the <b>Register Your Phone, Computer, or E-mail</b> notification and then select an option from the <b>Credential Type</b> drop-down menu.</p> <p><b>Note:</b> Regardless of the mechanism you choose, you will have thirty (30) minutes to retrieve and enter the Security Code. If you are unable to enter the code within thirty (30) minutes, then the code will expire and you will need to request a new Security Code. If selecting <b>Phone/Tablet/PC/Laptop as Credential Type</b>, you will first need to ensure you have the <b>VIP Client and appropriate VIP Access software</b> downloaded to your device. The <b>VIP Client and VIP Access software</b> can be downloaded via the <b>Symantec Site</b> (direct link is provided on your screen). If the <b>VIP Client and VIP Access software</b> is not installed on your device, you will be unable to complete the <b>Multi-Factor Authentication process</b>.</p>	

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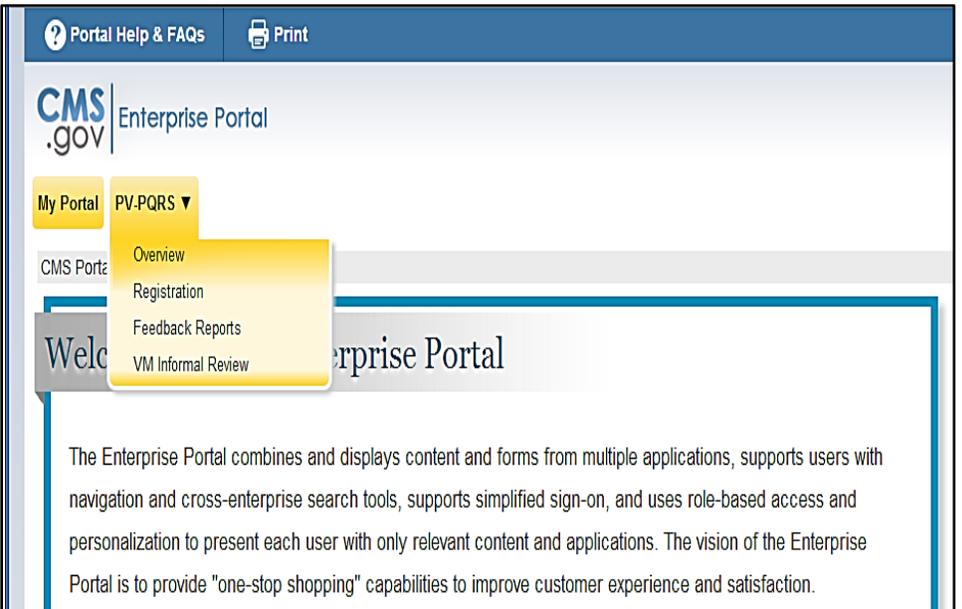
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Steps	Screenshots
<p>13. (a) If selecting <b>Phone/Tablet/PC/Laptop</b> as <b>Credential Type</b>, enter the alphanumeric code that displays under the field label <b>Credential ID</b> as <b>Credential ID</b> and <b>Application</b> as the <b>Credential Description</b>.</p> <p style="text-align: center;"><b>OR</b></p> <p>(b) If selecting <b>E-mail – One Time Password (OTP)</b> as <b>Credential Type</b>, the E-mail associated with the EIDM account will be entered as E-mail Address to obtain the security code. Enter <b>E-mail</b> as the <b>Credential Description</b>.</p> <p style="text-align: center;"><b>OR</b></p> <p>(c) If selecting <b>Text Message – Short Message service (SMS)</b> as <b>Credential Type</b>, enter the <b>Phone Number</b> that will be used to obtain the security code as <b>Phone Number</b> and <b>Text</b> as the <b>Credential Description</b>.</p> <p style="text-align: center;"><b>OR</b></p> <p>(d) If selecting <b>Voice Message – Interactive Voice Response (IVR)</b> as <b>Credential Type</b>, enter the <b>Phone Number</b> that will be used to obtain the security code as <b>Phone Number</b> and <b>IVR</b> as <b>Credential Description</b>.</p> <p>Select <b>Next</b> to continue.</p>	
<p>14. Your registration for the <b>Multi-Factor Authentication</b> is now complete. Select <b>OK</b> to proceed to the <b>My Profile</b> landing screen.</p> <p><b>Note:</b> You will receive an E-mail notification for successfully registering the <b>MFA</b> credential type.</p>	

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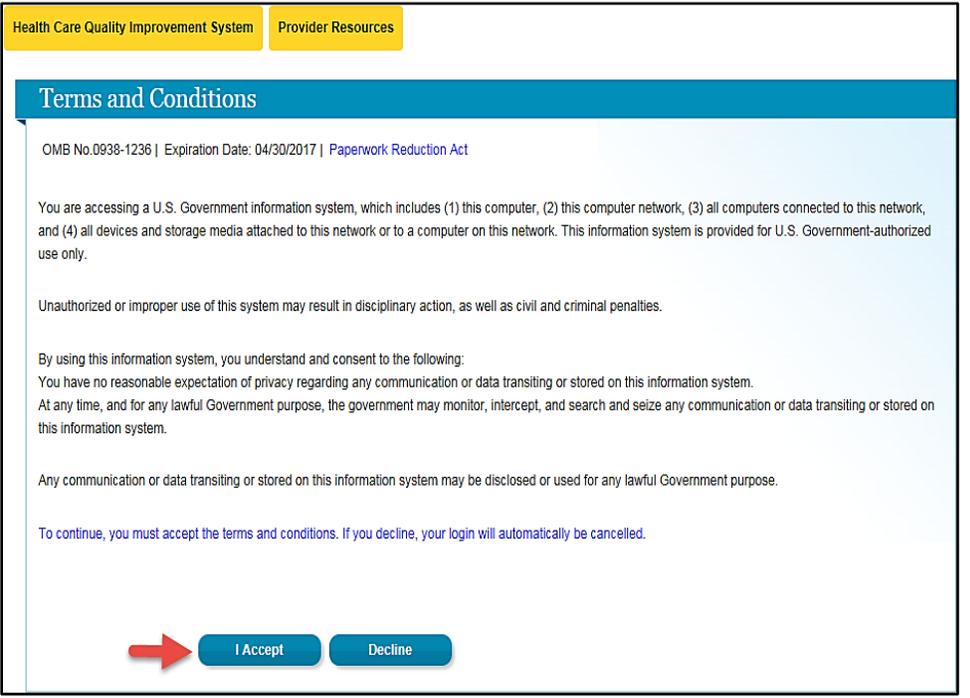
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- V. **Completing the Multi-Factor Authentication (MFA) – Multi-Factor Authentication will need to be completed each time you log into the CMS Enterprise Portal. Additional information on how the MFA process works can be found at <http://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/PhysicianFeedbackProgram/Obtain-2013-QRUR.html>.**

Steps	Screenshots
<p>15. <b>Log In</b> to the <b>CMS Enterprise Portal</b>. Enter the following information and select <b>Log In</b>:</p> <ol style="list-style-type: none"> <li>EIDM User ID</li> <li>EIDM Password</li> </ol> <p><b>Note:</b> <i>Multi-Factor Authentication (MFA) is a new approach to security authentication which will help improve CMS' ability to reduce fraud and ensure system security. It requires users to provide more than one form of verification in order to prove their identity to access certain information provided via the 'Physician Quality and Value Programs' application. MFA registration is required only once when you are requesting a role but will be verified at every logon.</i></p>	
<p>16. Select <b>Registration</b> (to register for the PQRS GPRO), <b>Feedback Reports</b> (to obtain a Mid-Year or Annual QRUR, Supplemental QRUR, or PQRS Feedback Report), or <b>VM Informal Review</b> (to submit an informal review request on behalf of a group practice) from the <b>PV-PQRS</b> drop-down menu.</p> <p><b>Note:</b> <i>You will be re-directed to the <b>Multi-Factor Authentication Terms and Conditions</b> screen in order to complete the second portion of the Multi-Factor Authentication process.</i></p>	

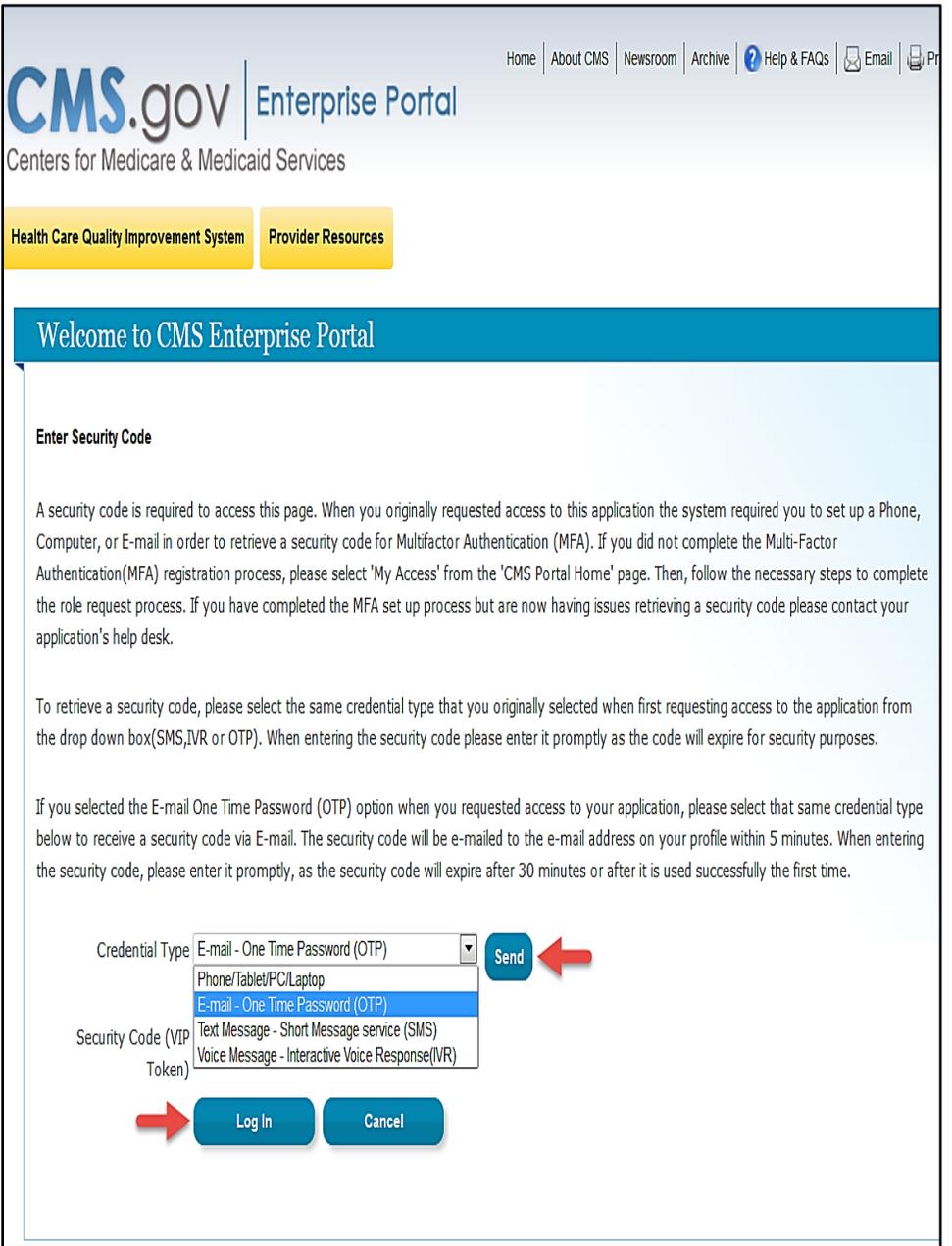
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Steps	Screenshots
17. Read the <b>Terms and Conditions</b> and select <b><i>I Accept</i></b> .	 <p>The screenshot shows the 'Terms and Conditions' page for the Health Care Quality Improvement System. At the top, there are two yellow buttons: 'Health Care Quality Improvement System' and 'Provider Resources'. Below them is a blue header with the text 'Terms and Conditions'. The main content area is light blue and contains the following text: 'OMB No.0938-1236   Expiration Date: 04/30/2017   <a href="#">Paperwork Reduction Act</a>'. The text continues: 'You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only. Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties. By using this information system, you understand and consent to the following: You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system. Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose. To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.' At the bottom, there are two buttons: 'I Accept' and 'Decline'. A red arrow points to the 'I Accept' button.</p>
18. Enter your <b>EIDM User ID</b> and <b>EIDM Password</b> on the <b>Multi-Factor Authentication Login</b> screen and select <b><i>Next</i></b> .	 <p>The screenshot shows the 'Enterprise Portal' for CMS.gov. At the top, there are navigation links: 'Home', 'About CMS', 'Newsroom', and 'Archive'. Below the navigation is the CMS.gov logo and the text 'Enterprise Portal' and 'Centers for Medicare &amp; Medicaid Services'. There are two yellow buttons: 'Health Care Quality Improvement System' and 'Provider Resources'. Below them is a blue header with the text 'Welcome to CMS Enterprise Portal'. The main content area is light blue and contains the following text: 'User ID' followed by a text input field with a red arrow pointing to it. Below that is 'Password' followed by a text input field with a red arrow pointing to it. At the bottom, there are two buttons: 'Log In' and 'Cancel'. A red arrow points to the 'Log In' button. Below the buttons are links for 'Forgot Password?', 'Forgot User ID?', and 'Need an account? Click the link - <a href="#">New user registration</a>'.</p>

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# Guide for Completing EIDM Account setup for Migrating IACS Users

Steps	Screenshots
<p>19. (a) Select the <b>Credential Type</b> from the drop-down menu and then select <b>Send</b> to receive a <b>Security Code</b>.</p> <p><b>Note:</b> You previously registered to complete the MFA process. Please ensure that you select the same <b>Credential Type</b> you selected when registering for the MFA process in Step 13. If you select a different <b>Credential Type</b>, you will receive an error message stating you did not register to complete MFA using the selected option and you will be unable to proceed. If you may have forgotten the <b>Credential Type</b> you selected, you may (1) retrieve the E-mail received upon successfully registering for MFA or (2) navigate to <b>My Profile</b> and select <b>Remove Your Phone or Computer</b> for this information. Selecting <b>Remove Your Phone or Computer</b> will display the <b>Credential Type</b> you selected to complete the MFA process.</p> <p>(b) Enter the <b>Security Code (VIP Token)</b> and then select <b>Log In</b>.</p> <p><b>Note:</b> You will have thirty (30) minutes to retrieve and enter the Security Code. If you are unable to enter the code within thirty (30) minutes, then the code will expire and you will need to request a new Security Code.</p>	
<p>20. The <b>Multi-Factor Authentication</b> process is now complete. You will be redirected to your initial selection (Registration, Feedback Reports, or VM Informal Review [for group practices only]) within the PV-PQRS drop-down menu.</p>	

**If you have questions about the or need assistance accessing any of the reports, please contact the QualityNet Help Desk by phone at 866-288-8912. Normal business hours are Monday-Friday from 8 am to 8 pm EST**