APTA Sign-Up Portal

User Manual

Version 1
# Table of Contents

## A. Introduction

## B. Log in Window

### B.1 Access to APTA Sign Up Portal

#### B.1.a Log In for Existing Users

#### B.1.a.i Reset Password

#### B.1.a.ii Forgot Account’s Password

#### B.1.a.iii Recovery Link

#### B.1.a.iv Reset Password Window

#### B.1.b Register New Users

#### B.1.b.i Create New User Account with APTA Registry

## C. Sign Up Portal

### C.1 Practice Information

#### C.1.a Practice Information

#### C.1.b Practice Admin Contact

#### C.1.b.i Add Practice Admin Contact

#### C.1.b.ii Update Practice Admin Contact

#### C.1.b.iii Delete Practice Admin Contact

### C.2 Provider and Location

#### C.2.a Provider

#### C.2.a.i Add New Provider

#### C.2.a.ii Update Provider Details

#### C.2.a.iii Delete a Provider

#### C.2.b Location

#### C.2.b.i Add New Location

#### C.2.b.ii Update Location

#### C.2.b.iii Delete Location

### C.3 TIN Information

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**FIGmd, Inc.** 6952 Rote Rd, Suite 400, Rockford, IL 61107 Tel: +1 (773) 672 3155

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C.3.i. Add TIN Information ................................................................. 35
C.3.ii. Update TIN Information ......................................................... 37
C.3.iii. Delete TIN Information ........................................................ 38
C.4. EHR Information ....................................................................... 39
C.4.i. IT Contact Information .............................................................. 41
C.4.ii. Electronic Health Record (EHR) Information ......................... 42
C.4.iii. Practice Management (PM) System Information ................. 44
C.5. Agreement ................................................................................ 45
C.5.i. E-Sign the Agreement Now .................................................. 46
C.5.ii. E-Sign the Agreement Later ................................................. 54
D. Glossary ...................................................................................... 58
A. Introduction

The American Physical Therapy Association (APTA) is an individual membership professional organization representing more than 93,000 member physical therapists (PTs), physical therapist assistants (PTAs), and students of physical therapy. APTA seeks to improve the health and quality of life of individuals in society by advancing physical therapist practice, education, and research, and by increasing the awareness and understanding of physical therapy's role in the nation's health care system.

APTA plans to transform society, the profession, and the association by correlating closely with the 8 guiding principles of the vision: Identity, Quality, Collaboration, Value, Innovation, Consumer-Centricity, Accessibility, and Advocacy.
B. Log in Window

B.1 Access to APTA Sign Up Portal

To access the application,

- Open a web browser (e.g. Google Chrome, Mozilla Firefox, Internet Explorer)
- Type or copy paste the URL https://www.therapyoutcomesregistry.com/DemoSignUp/Registry.aspx in the browser.
- Click Enter.

The web browser displays a window allowing the User to either

a. **Sign In (Login)** the APTA Registry

b. **Sign Up (Register with)** the APTA Registry
B.1.a. Log In for Existing Users

If the **User** is APTA Registry user, he/she enters the **Login credentials** i.e. user name and password received through email.

![Login Screen](image)

**Figure 1: Login screen**
B.1.a.i. Reset Password

The password may be reset at any time by clicking Reset Password button.

![Login and Reset Password buttons with Username and Password fields]

Clicking the button opens window, allowing the User to submit a request using the registered email address.

B.1.a.ii. Forgot Account’s Password

Forgot your account's password? Enter your registered email address and we'll send you a recovery link.

![Registered Email Address field with email address example]

Figure 3: Registered Email address of the User
B.1.a.iii. Recovery Link

The following recovery email is sent to the registered email account.

```
Dear Demo User,

Based on your recent request below is the link to change your password for your account:
https://www.therapyoutcomesregistry.com/DemoSignUpRegister.aspx?key=a5766ff8-e166-4fc6-8a65-02d940232dd

For any further assistance, kindly contact us at apta.support@bot.figmd.com

Regards,
APTA Registry Support Team.
```

![Figure 4: Link to Reset the Password]

B.1.a.iv. Reset Password Window

- Clicking the recovery link in the email opens the reset password window.
B.1.b. Register New Users

If the User is a new user, he/she clicks the “Register New User” link.

- Clicking the link displays screen to create Login credentials.
  - Create Username.
  - Create Password and re-enter it to confirm.
- Click Next Step button.
B.1.b.i. Create New User Account with APTA Registry

**Next Step** Button displays window capturing User’s demographic information to create an account with APTA Registry.

![APTA Registry Form](image)

---

Figure 8: APTA Registry Form
The Registration form has CAPTCHA- a security check to ensure

- Only human users are registering to APTA Registry.
- Websites is protected against bots.
- Information entered during registration is protected.
- Email Addresses is protected from Scrapers.
- Email addresses are protected against email worms and spam.

The details captured in demographic fields are:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name *</td>
<td>It is the first name of the User intending to enrol with APTA Registry.</td>
<td>Text</td>
</tr>
<tr>
<td>Middle Name</td>
<td>It is the middle name of the User.</td>
<td>Text</td>
</tr>
<tr>
<td>Last Name *</td>
<td>It is the last name of the User intending to enrol with APTA Registry.</td>
<td>Text</td>
</tr>
<tr>
<td>Phone Number *</td>
<td>It is the valid phone number of the User intending to enrol with APTA Registry.</td>
<td>Numeric</td>
</tr>
<tr>
<td>Email Address *</td>
<td>It is the email address of the User intending to enrol with APTA Registry.</td>
<td>Alpha Numeric</td>
</tr>
<tr>
<td>NPI*</td>
<td>It is the NPI of the User intending to enrol with APTA Registry.</td>
<td>Numeric</td>
</tr>
<tr>
<td>APTA Member ID</td>
<td>It is the Member ID of the User who is APTA member.</td>
<td>Numeric</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>It is the Date of Birth of the User intending to enrol with APTA Registry.</td>
<td>MM-DD-YYYY</td>
</tr>
<tr>
<td>Provider Type *</td>
<td>It is pre-populated and non-editable</td>
<td>Text</td>
</tr>
<tr>
<td>PT School State of Graduation *</td>
<td>It is the state where the User’s PT School State of Graduation is physically present. Select the state from the displayed options.</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Entry Level PT Degree *</td>
<td>It is the Provider’s Entry Level PT Degree. Select the appropriate degree from the displayed options.</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Graduation Year *</td>
<td>It is the Graduation year of the Provider. Use Calendar to select the year.</td>
<td>YYYY</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Format</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>ABPTS Specialization *</td>
<td>It is the User’s ABPTS Specialization. Select the appropriate specialization from the options displayed. Select “none”, if the User’s area of specialization is not displayed. Select “Other”, if the User has specialization other than the displayed specializations. Selecting the option “Other” enables a field to enter free text.</td>
<td>Drop Down, Text</td>
</tr>
<tr>
<td>APTA Residency/ Fellowship *</td>
<td>It is the information about User’s APTA Residency/ Fellowship. Select “none” if the Provider has not undergone APTA Residency/ Fellowship. Select option “Other” in case the Provider’s APTA Residency/Fellowship options are not displayed</td>
<td>Drop Down, Text</td>
</tr>
<tr>
<td>Enter the text you see *</td>
<td>Enter the text displayed in the Captcha</td>
<td>Alpha Numeric</td>
</tr>
</tbody>
</table>

Table 1: User Demographic & Practice Information

The fields marked by the Red Asterisk (*) are Mandatory Fields
C. Sign Up Portal

On successful Login/Account creation, the APTA Sign Up portal is displayed.

The portal has five Milestones:

1. Practice Information
2. Provider and Location
3. TIN Information
4. EHR Information
5. Agreement

Figure 9: APTA Sign Up Portal
C.1. Practice Information

This is the first milestone. It captures demographic information about a Practice.

It has two sections

  a.  Practice Information
  b.  Practice Admin Contact

C.1.a. Practice Information

It has following fields

![Practice Information Window]

*Figure 10: Practice Information Window*
Following fields are displayed under Practice Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practice Name *</td>
<td>Key in the valid name by which the Practice is identified.</td>
<td>Text</td>
</tr>
<tr>
<td>Address 1 *</td>
<td>Enter the registered address of the Practice</td>
<td>Alpha Numeric</td>
</tr>
<tr>
<td>Address 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State *</td>
<td>Select the state from the displayed options</td>
<td>Drop Down</td>
</tr>
<tr>
<td>City *</td>
<td>City corresponding to the selected state are displayed.</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Zip *</td>
<td>It is the zip code of the Practice address</td>
<td>Numeric</td>
</tr>
<tr>
<td>Practice Site ID *</td>
<td>It is the 5 digit unique number assigned to the Practice Site</td>
<td>Numeric</td>
</tr>
</tbody>
</table>

Table 2: Practice Information

- Enter the correct information in the displayed fields.
- Click Save

Upon successful completion a message “Practice Information saved successfully” is displayed.

Figure 11: Practice Information saved successfully
C.1.b. Practice Admin Contact

This is the second section in this milestone.

Every participating Practice must designate a Practice Administrator (Practice Admin) for APTA who will be the primary contact for APTA.

By default, the user who logs in is designated as the Practice Admin Contact, but other users may be added as Practice Admin or removed within this section.

![Figure 12: Practice Admin Contact](image-url)
C.1.b.i. Add Practice Admin Contact

Clicking Add New Practice Contact button, opens a window to enter the New Practice Contact information.

![Add Practice Admin Contact](image)

- If the User is also a Provider click the check box.
- Clicking the “Check this box if also a Provider” displays additional fields on the screen.
Figure 14: Add Practice Admin Contact with Additional Fields

- Click the check box to receive updates from the Registry via e-mail from registry staff.
- Click Save.
The fields in the **Add Practice Admin Contact** are

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name *</td>
<td>It is the first name of the User to be added as Practice Admin Contact.</td>
<td>Text</td>
</tr>
<tr>
<td>Middle Name</td>
<td>It is the middle name of the User to be added as the Practice Admin Contact.</td>
<td>Text</td>
</tr>
<tr>
<td>Last Name *</td>
<td>It is the last name of the User to be added as the Practice Admin Contact.</td>
<td>Text</td>
</tr>
<tr>
<td>Phone Number *</td>
<td>It is the valid phone number of the User to be added as the Practice Admin Contact.</td>
<td>Numeric</td>
</tr>
<tr>
<td>Email Address *</td>
<td>It is the email address of the User to be added as the Practice Admin Contact.</td>
<td>Alpha Numeric</td>
</tr>
<tr>
<td>User Name *</td>
<td>It will be used by the User to access reporting web portal or interactive dash board</td>
<td>Alpha Numeric</td>
</tr>
</tbody>
</table>

*Below Fields are displayed if the Provider Check Box has been checked*

<p>| NPI*            | National Provider Identifier – used to identify unique Providers within APTA and may be used for CMS reporting programs in the future | Numeric         |
| Date of Birth   | It is the Date of Birth of the User                                           | MM-DD- YYYY     |
| Sex             | It is the Gender of the User                                                  | Drop Down       |
| Provider Type * | It is Pre-populated and non –editable                                          |                 |
| Race            | It is race of the User. Select from the displayed options.                    | Drop Down       |
| Ethnicity       | It is ethnicity of the User. Select from the displayed options.               | Drop Down       |</p>
<table>
<thead>
<tr>
<th><strong>APTA Member ID</strong></th>
<th>It is the unique number assigned to the APTA members.</th>
<th><strong>Numeric</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>**PT School State of Graduation ***</td>
<td>It is the state where User’s PT school of Graduation is present. Select the state from the displayed options</td>
<td><strong>Drop Down</strong></td>
</tr>
<tr>
<td>**Graduation Year ***</td>
<td>It is the Graduation year of the User.</td>
<td><strong>YYYY</strong></td>
</tr>
<tr>
<td>**Entry Level PT Degree ***</td>
<td>Select the degree from the options displayed. Select “Other” for option that is not represented for the Entry Level PT Degree. Enter the appropriate description.</td>
<td><strong>Drop Down, Text</strong></td>
</tr>
<tr>
<td><strong>Highest Academic Degree</strong></td>
<td>Select the Highest Degree from the options displayed. Select option “Other” for option that is not represented for the Highest Academic degree. Enter the appropriate description.</td>
<td><strong>Drop Down, Text</strong></td>
</tr>
<tr>
<td>**ABPTS Specialization ***</td>
<td>Select the User’s ABPTS specialization from the options displayed. Select option “Other” for option that is not represented for the ABPTS Specialization. Enter the appropriate description. Select option “None” if the User’s does not qualify for specializations displayed.</td>
<td><strong>Drop Down</strong></td>
</tr>
<tr>
<td>**APTA Residency Fellowships ***</td>
<td>Select the appropriate option. Select option “Other” for option that is not represented for the APTA Residency/Fellowships. Enter the appropriate description Select option “None” if the User’s does not qualify for displayed Residency/Fellowships options.</td>
<td><strong>Drop Down</strong></td>
</tr>
</tbody>
</table>

*Table 3: Add Practice Admin Contact*
A message “Practice Admin Contact added successfully” is displayed.

Newly created Practice Admin Contact is displayed in the Practice Admin Contact Table.

![Practice Admin Contact Added](image-url)

**Figure 15: Practice Admin Contact Added**
C.1.b.ii. Update Practice Admin Contact

Clicking on an existing Practice Admin Contact record displays the Update Admin Contact window for User to edit the details.

- Make the required changes.
- Click Save.

![Update Practice Admin Contact](image)

Figure 16: Update Admin Contact
The edited User information is displayed in the Practice Admin Contact Table.

![Practice Admin Contact Table](image)

*Figure 17: Update Practice Admin Contact*
C.1.b.iii. Delete Practice Admin Contact

Existing Provider records can be deleted by clicking **Delete** icon in the appropriate row.

The default Practice Admin record cannot be deleted.

- Clicking the **Yes** option deletes the Practice Admin record from the table
- Clicking the **Cancel** option cancels the delete.

Clicking the **Next** button displays next milestone.
C.2. Provider and Location

This is the second milestone and captures information about the Provider(s) within the Practice.

![Figure 20: Provider Information Table](image)

- Total Number of Providers: 4
- Click to add Provider account

---

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C.2. a. Provider

The **Practice Admin Contact** record(s) will be pre-populated in the **Provider Information** table if the User had checked the “Check this box if also a Provider” in the “Add Practice Admin Contact” section in the first milestone.

![Figure 21: Provider as Practice Admin Contact](image)

*Figure 21: Provider as Practice Admin Contact*
C.2.a.i. Add New Provider

Clicking **Add New Provider** button displays following screen allowing User to add multiple Providers.

![Add New Provider Screen]

- Click the **check box** to receive updates from the Registry via e-mail from registry staff.
- Click **Save**.
The fields in Add New Provider are:

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name *</td>
<td>It is the first name of the User to be added as Practice Admin Contact.</td>
<td>Text</td>
</tr>
<tr>
<td>Middle Name</td>
<td>It is the middle name of the User to be added as the Practice Admin Contact.</td>
<td>Text</td>
</tr>
<tr>
<td>Last Name *</td>
<td>It is the last name of the User to be added as the Practice Admin Contact.</td>
<td>Text</td>
</tr>
<tr>
<td>Phone Number *</td>
<td>It is the valid phone number of the User to be added as the Practice Admin Contact.</td>
<td>Numeric</td>
</tr>
<tr>
<td>Email Address *</td>
<td>It is the email address of the User to be added as the Practice Admin Contact.</td>
<td>Alpha Numeric</td>
</tr>
<tr>
<td>User Name *</td>
<td>It will be used by the User to access reporting web portal or interactive dash board</td>
<td>Alpha Numeric</td>
</tr>
<tr>
<td>NPI *</td>
<td>National Provider Identifier – used to identify unique Providers within APTA and may be used for CMS reporting programs in the future</td>
<td>Numeric</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>It is the Date of Birth of the User</td>
<td>MM-DD- YYYY</td>
</tr>
<tr>
<td>Sex</td>
<td>It is the Gender of the User</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Provider Type</td>
<td>It is Pre-populated and non-editable</td>
<td></td>
</tr>
<tr>
<td>Race</td>
<td>It is race of the User. Select from the displayed options.</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>It is ethnicity of the User. Select from the displayed options.</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Type</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>APTA Member ID</td>
<td>It is the unique number assigned to the APTA members.</td>
<td>Numeric</td>
</tr>
<tr>
<td>PT School State of Graduation *</td>
<td>It is the state where User’s PT school of Graduation is present. Select the state from the displayed options</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Graduation Year *</td>
<td>It is the Graduation year of the User.</td>
<td>YYYY</td>
</tr>
<tr>
<td>Entry Level PT Degree *</td>
<td>Select the degree from the options displayed.</td>
<td>Drop Down, Text</td>
</tr>
<tr>
<td></td>
<td>Select “Other” for option that is not represented for the Entry Level PT Degree. Enter the appropriate description.</td>
<td></td>
</tr>
<tr>
<td>Highest Academic Degree</td>
<td>Select the Highest Degree from the options displayed.</td>
<td>Drop Down, Text</td>
</tr>
<tr>
<td></td>
<td>Select option “Other” for option that is not represented for the Highest Academic degree. Enter the appropriate description.</td>
<td></td>
</tr>
<tr>
<td>ABPTS Specialization *</td>
<td>Select the User’s ABPTS specialization from the options displayed.</td>
<td>Drop Down</td>
</tr>
<tr>
<td></td>
<td>Select option “Other” for option that is not represented for the ABPTS Specialization. Enter the appropriate description.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select option “None” if the User’s does not qualify for specializations displayed.</td>
<td></td>
</tr>
<tr>
<td>APTA Residency Fellowships *</td>
<td>Select the appropriate option.</td>
<td>Drop Down</td>
</tr>
<tr>
<td></td>
<td>Select option “Other” for option that is not represented for the APTA Residency/Fellowships. Enter the appropriate description.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select option “None” if the User’s does not qualify for displayed Residency/Fellowships options.</td>
<td></td>
</tr>
</tbody>
</table>

*Table 4: New Provider Details*

Minimum of one Provider record must be added before signing the Agreement.
A message Provider Added successfully is displayed.

Figure 23: New Provider Record Added
C.2.a.ii. Update Provider Details

Existing Provider records can be edited by clicking in the appropriate row.

![Update Provider Details](image)

Figure 24: Update Existing Provider Record
C.2.a.iii. Delete a Provider

Existing Provider records can be deleted by clicking **Delete** icon in the appropriate row.

---

**Figure 25: Delete a Provider Record**

- Clicking **Yes** button deletes the Provider Record from the table.
- Clicking **Cancel** cancels delete.

---

**Figure 26: Confirm Deletion**
C.2. b. Location

This tab captures the demographic information of the Locations existing within the Practice.

![Diagram of Location Information Table]

Figure 27: Location Information Table

Total Number of Locations of a Practice

Click to add new location to a Practice
C.2.b.i. Add New Location

Clicking **Add New Location** button displays following screen allowing the User to add multiple Locations.

![Add New Location Screen](image)

**Figure 28: Add New Location**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Name *</td>
<td>Enter valid location name where Practice is physically present.</td>
<td>Text</td>
</tr>
<tr>
<td>Address *</td>
<td>Enter registered address of the Practice corresponding to the location.</td>
<td>Alpha Numeric</td>
</tr>
<tr>
<td>State *</td>
<td>Select the state corresponding to the location of the Practice.</td>
<td>Drop Down</td>
</tr>
<tr>
<td>City *</td>
<td>Select the city corresponding to the State.</td>
<td>Drop Down</td>
</tr>
</tbody>
</table>

Other (please specify): Demo Other
<table>
<thead>
<tr>
<th>Zip Code *</th>
<th>It is the Zip code of the Practice address</th>
<th>Numeric</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Type *</td>
<td>Response Options: Acute Care Hospital, Hospital based Outpatient Facility or Clinic, Private Outpatient office or Group Practice, SNF or Long Term Care, Patient’s Home/Home Care, School System, Health and Wellness Facility, Research Center, Industry, IRF</td>
<td>Drop Down</td>
</tr>
</tbody>
</table>

Other: Enter a description for the site type that is not represented.

Table 5: Add New Location Details

![Figure 29: Location Added to the Location Information Table](image-url)
C.2. b. ii. Update Location

Existing Location records can be edited by clicking in the appropriate row.

![Update Location Details](image1)

**Figure 30: Update Location Details**

![Location Information Table](image2)

**Figure 31: Location Record Update in the Location Information Table**
C.2. b. iii. Delete Location

Existing Location records can be deleted by clicking **Delete** icon in the appropriate row.

![Delete Location Record](image)

**Figure 32: Delete a Location Record**

<table>
<thead>
<tr>
<th>Location Name</th>
<th>Address</th>
<th>State</th>
<th>City</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>DemoLocation1</td>
<td>Demo Address 1</td>
<td>Delaware</td>
<td>Demo City One</td>
<td>12345</td>
</tr>
<tr>
<td>DemoLocation2</td>
<td>Demo Address 2</td>
<td>Arizona</td>
<td>Demo City A</td>
<td>95045</td>
</tr>
<tr>
<td>DemoLocation3</td>
<td>Demo Address 3</td>
<td>Arizona</td>
<td>Demo City Three</td>
<td>71542</td>
</tr>
<tr>
<td>DemoLocation4</td>
<td>Demo Address 4</td>
<td>Delaware</td>
<td>Demo City Four</td>
<td>12345</td>
</tr>
<tr>
<td>DemoLocation5</td>
<td>Demo Address 5</td>
<td>Kentucky</td>
<td>Demo City Five</td>
<td>65859</td>
</tr>
</tbody>
</table>

![Confirm Deletion of Location Record](image)

**Figure 33: Confirm Deletion of a Location Record**

- Clicking **Yes** button deletes the Location record from the table.
- Clicking **Cancel** button retains the record in the table.

Clicking the **Next** button opens next milestone.
C.3. TIN Information

This is the third milestone and captures the Tax Identification Number for the Practice.

- Provide 9 digit TIN and its validity Period

![Practice TIN Information Table]

Figure 34: Practice TIN Information Table

C.3.i. Add TIN Information

Practice with more than one valid TIN, may enter additional ones by clicking Add New Practice TIN.

![Add New Practice TIN]

Figure 35: Add New Practice TIN
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIN*</td>
<td>Nine numeric digits, no spaces or dashes</td>
</tr>
<tr>
<td>Valid From*</td>
<td>The date the TIN became active for the practice</td>
</tr>
<tr>
<td>Valid Through</td>
<td>The date after which the TIN is no longer valid</td>
</tr>
</tbody>
</table>

*Figure 36: TIN Record Added in the TIN Information Table*
C.3.ii. Update TIN Information

Existing TIN records can be edited by clicking in the appropriate row.

Figure 37: Update Practice TIN Window

Figure 38: Updated TIN Record displayed in the TIN Information Table
C.3.iii. Delete TIN Information

- Click the **Delete** icon to remove a TIN record

![Figure 39: Delete a TIN Record](image)

![Figure 40: Confirm Deletion of a TIN record](image)

- Clicking the **Delete** button deletes the TIN record from the table.
- Clicking the **Cancel** button retains the TIN record.

Clicking the **Next** button navigates the User to the next milestone.
C.4. EHR Information

This is the fourth milestone, the EHR Information (Electronic Health Record Information) that captures information about the EHR and Practice Management (PM) Software used by Practice Staff.

This information helps guide data collection and mapping of the information for reports.

A screen pops up asking if the Practice has any EHR information or not:

- Clicking No takes the Provider/User at the Practice side to final milestone Agreement.
- Clicking Yes displays screen allowing the User to enter EHR related information.
This milestone has three sections

- IT Contact Information Section
- Electronic Health Record Information
- Practice Management (PM) System Information

Figure 41: EHR Information Milestone
C.4.i. IT Contact Information

This section captures information about the IT personnel at the Practice side.

### A. IT Contact Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Practice IT Contact Name *</td>
<td>It is the name of the IT contact person at the Practice End</td>
<td>Text</td>
</tr>
<tr>
<td>Practice IT Contact Email *</td>
<td>It is the valid email address of the IT contact person at the Practice End</td>
<td>Alpha Numeric</td>
</tr>
<tr>
<td>Practice IT Contact Phone Number *</td>
<td>It is the valid phone number of the IT contact person at the Practice End</td>
<td>Number</td>
</tr>
</tbody>
</table>

*Figure 42: IT Contact Information*

*Table 7: IT Contact Information*
C.4.ii. Electronic Health Record (EHR) Information

This section gathers information related to the EHR used by Practice staff.

### B. Electronic Health Record (EHR) Information

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of EHR System:*</td>
<td>NEXT Gen</td>
</tr>
<tr>
<td>Version of EHR System:*</td>
<td>2.0</td>
</tr>
<tr>
<td>Is your EHR a complete 2014 Certified EHR Technology (CEHRT)? *</td>
<td>Yes</td>
</tr>
<tr>
<td>Which Stage of Meaningful Use are the majority of your practice’s providers scheduled to report this year? *</td>
<td>Stage 2, Year 1</td>
</tr>
<tr>
<td>EHR Hosting:*</td>
<td>ASP Model Hosted By EHR C</td>
</tr>
</tbody>
</table>

**Relational Database Management System used by EHR:**

- **MSSQL 2005**
- **MSSQL 2008**
- **Oracle Version:** 3.6
- **PostgreSQL Version**
- **MySQL Version**
- **Other** Demo Other
- **Unknown**

*Figure 43: EHR Information*
<table>
<thead>
<tr>
<th>Question</th>
<th>Description</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of the EHR System*</td>
<td>Select from the displayed options. Other [If selected, enter description]</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Version of EHR*</td>
<td>It is the version of the HER system</td>
<td>Numeric</td>
</tr>
<tr>
<td>Is your EHR a complete 2014 Certified EHR Technology (CEHRT)?*</td>
<td>Information is used to determine viability of the EHR to report for meaningful use, and clinical quality measures.</td>
<td>Radio Button</td>
</tr>
<tr>
<td>Which stage of Meaningful Use are the majority of your Practice’s providers scheduled to report this year?*</td>
<td><strong>Response Options:</strong></td>
<td>Drop Down</td>
</tr>
<tr>
<td>EHR Hosting*</td>
<td>Where data collected captured in the EHR are stored and managed by whom. <strong>Response Options:</strong></td>
<td>Drop Down</td>
</tr>
<tr>
<td>Relational Database Management System used by EHR:*</td>
<td>In what type of database the data captured from the EHR are stored. <strong>Response Options:</strong></td>
<td>Check Box</td>
</tr>
<tr>
<td>(Check all that apply)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 8: EHR Information
C.4.iii. Practice Management (PM) System Information

This section gathers information related to the PM software used by Practice staff.

**C. Practice Management (PM) System Information**

<table>
<thead>
<tr>
<th>Name of PM System:</th>
<th>ADS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version of PM System:</td>
<td>3.5</td>
</tr>
</tbody>
</table>

*Figure 44: Practice Management System Information*

<table>
<thead>
<tr>
<th>Question</th>
<th>Description</th>
<th>Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of PM System</td>
<td>Select from the displayed options</td>
<td>Drop Down</td>
</tr>
<tr>
<td>Version of PM System</td>
<td>It is the version of the PM system being used at the Practice side.</td>
<td>Numeric</td>
</tr>
</tbody>
</table>

*Table 9: PM System Information*
C.5. Agreement

This is the fifth and final milestone of the APTA Sign Up Portal.

Every Practice participating in APTA must agree to the terms in a Business Associate, Data Use, and Data Warehousing Agreement.

The agreements are available within the Sign Up Portal for electronic signature and may be signed by the User logged into the portal or by the User or an appropriate individual in the practice (CEO, Owner, Privacy Officer, etc.) for signature later.

Participation in APTA Registry does not proceed until the agreements are signed.

- **Name**: It is the name of the Practice Admin or any Legal Signatory from Practise side.

- **Email/ Confirm Email**: All agreement related correspondence will be sent to the registered email address entered here.
C.5.i. E-Sign the Agreement Now

This option opens the Agreement in PDF format right away, allowing the User to **Sign the Agreement**.

- Clicking the **Sign APTA Agreement** opens the Agreement in the PDF format.
- Record gets added to the Agreement table, with
  
  i. Signing option listed as **“Sign through portal”**
  ii. Status of the agreement listed as **“Not Signed”**
  iii. Is Void as **No**
Important Note: There are 3 signatures required for APTA agreement. You can find them on pages 15 & 16 for the APTA Agreement. Once all 3 signature blocks are signed for an agreement, a "Click to sign" button will appear at the very bottom. This button must be clicked to finalize that agreement. You will know you have correctly signed agreement when a message box appears thanking you for completing the agreement.

Start

Adobe Sign

Options →

Please sign: [DEMO USE ONLY] APTARegistrationAgreement...

AMERICAN PHYSICAL THERAPY ASSOCIATION
PARTICIPATION AGREEMENT

APTA PHYSICAL THERAPY OUTCOMES REGISTRY

THIS AGREEMENT is entered into and made effective the 24th day of November, 2016, [ Effective Date ], by and between (a) AMERICAN PHYSICAL THERAPY ASSOCIATION, an Illinois not-for-profit corporation with its principal place of business at 1111 1st Street, Alexandria, Virginia 22314 (“APTA”) and (b) [Organization Name and Address].

WHEREAS, APTA and Participant are each a “Party” to this Participation Agreement and are referred to collectively herein as the “Parties.”

WHEREAS, APTA has developed and owns certain electronic databases containing information relating to patient enrollment and the practice of physical therapy known as the APTA Physical Therapy Outcomes Registry (“the Registry”), and third parties submit data to these databases pursuant to APTA rules, and

WHEREAS, Participant has expressed an interest in participating in the Registry in accordance with APTA requirements.

Adobe Sign Test Document

Not for commercial use

1. Participation Agreement

1.1 Participant agrees to participate in the Registry by transmitting data through a web-based portal or other means designated by APTA, either directly or via a third party vendor designated by Participant (“the Vendor”) for the collection and submission of data pertaining to the practice of physical therapy.

1.2 Participant will participate in the data harvest conducted by the Registry by submitting Participant’s data to the APTA through its web-based portal, and otherwise complying with the rules and harvest schedules reasonably established by APTA in connection therewith.

Figure 48: APTA Agreement
Figure 49: Agreement with blank fields

Click here to enable Signing Options

Figure 50: Sign Spot
Clicking the signature field displays the signature window shown below.

Two methods to ‘sign’ the document include the following:

- Type signature
- Draw signature

Once signature is entered, click **Apply**.

- Click Yellow **Next** Arrow to proceed to next signature spot.

---

**Figure 51: Signing Options**

**Figure 52: Typed Signature**
• As each required signature is completed, the “Next Required” number decreases.

• Upon completion of all required signatures, the APTA Registry terms and conditions must also be signed by clicking the blue Click to sign button.

Figure 53: Agreement Terms and Conditions
• Upon completion of the last signature requirement, the window to Download Agreement copy is displayed.

![Adobe Sign]

Thank you for signing APTARegistrationAgreement.pdf

A signed copy has been sent to you.

Download a copy

Click here to download the Signed Agreement

Figure 54: Thank you note from APTA Registry

In the Sign Agreement table, upon completing “Signing the Agreement”, the

• Status changes to Signed
• Re-Generate/View Agreement displays Agreement in PDF format for viewing.

![Sign Agreements]

Total Records: 1

Figure 55: Sign Agreement Status
Clicking the Finish button displays a note from APTA displaying along with message regarding the welcome email.

Figure 56: Registration Complete message

In case the User closes the displayed Agreement without signing, he/she can sign the agreement by clicking the Re-generate button.

Figure 57: Click Re-generate to Re-sign the Agreement

The previously created record in the Sign Agreement table stands voided.

Figure 58: Previous record stands voided
- Clicking the **Re-generate** button displays the below screen

![Sign Agreement Table with Voided and Non-Voided records](image)

**Figure 59: Would you like to sign the Agreement**

Clicking **Sign Now** button opens the Agreement in PDF format, whereas by clicking the **Sign Later** button, a link to Sign the Agreement is sent to the User through email.

Below screen is displayed in case the User completes **Signing the Agreement** with **Sign Now** option.

<table>
<thead>
<tr>
<th>SIGNING OPTION</th>
<th>CREATED ON</th>
<th>EMAIL ADDRESS</th>
<th>STATUS</th>
<th>SIGNED ON</th>
<th>AGREEMENT NAME</th>
<th>VOID</th>
<th>RE-GENERATE/VIEW AGREEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign through portal</td>
<td>11-25-2016</td>
<td><a href="mailto:demophysician@gmail.com">demophysician@gmail.com</a></td>
<td>Signed</td>
<td>11-25-2016</td>
<td>APTA Agreement</td>
<td>NO</td>
<td></td>
</tr>
<tr>
<td>Sign through portal</td>
<td>11-25-2016</td>
<td><a href="mailto:demophysician@gmail.com">demophysician@gmail.com</a></td>
<td>Not-Signed</td>
<td></td>
<td>APTA Agreement</td>
<td>YES</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 60: Sign Agreement Table with Voided and Non-Voided records**
C.5.ii. E-Sign the Agreement Later

This option allows the User to sign the agreement at a later stage or send the agreement to another individual within the practice to sign.

![Image of the Sign Agreements form]

Figure 61: Sign Agreement Later

Click here to sign the agreement later
• An email is sent from APTA to the registered email address with a link to Sign the Agreement.

Clicking on the link embedded within the email will open the agreement in PDF format.

A record gets added to the Agreements table, with

i. Signing option as “Sign through mail”
ii. Status of the agreement shows as “Not Signed”
iii. Is Void as “No”

![Image of email with link to sign agreement]

**Figure 62: Email with Link to sign the Agreement**

![Image of sign agreement status table]

**Figure 63: Sign Agreement Status**
• Follow the aforementioned process to complete the e-signing process.

• The following screen displays upon completion of signing the Agreement.

![Image: Button to download copy of the Signed Agreement]

Figure 64: Button to download copy of the Signed Agreement

In case the User closes the displayed Agreement without signing, he/she can sign the agreement by clicking the Re-generate button.

![Image: Click Re-generate button to re-sign the Agreement]

Figure 65: Click Re-generate button to re-sign the Agreement

The previously created record in the Sign Agreement table stands **voided**.

![Image: Earlier record stands voided]

Figure 66: Earlier record stands voided
• Clicking the **Re-generate** button displays the below screen

![Figure 67: Option while Re-signing the Agreement](image)

Would you like to Sign the agreement?
(Note: This agreement is generated before but not signed, creating new agreement will void previous agreement.)

![Sign Now] ![Sign Later] ![Cancel]

**Figure 67: Option while Re-signing the Agreement**

Clicking **Sign Now** button opens the Agreement in PDF format, whereas by clicking the **Sign Later** button, a link to sign the Agreement is sent to the User through email.

Below screen is displayed in case the User completes **Signing the Agreement** with **Sign Later** option.

![Sign Agreements](image)

**Figure 68: Previously signed Agreement stands voided**

This completes User manual for APTA Sign Up Portal.
D. Glossary

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Login</strong></td>
<td>Allows the User to access the APTA Sign up portal after entering the correct user name and password.</td>
</tr>
<tr>
<td><strong>Reset Password</strong></td>
<td>Allows the User to recreate the password to access the APTA Sign Up Portal</td>
</tr>
<tr>
<td><strong>Save</strong></td>
<td>Allows the User to save the information entered in the displayed fields.</td>
</tr>
<tr>
<td><strong>Add New Practice Contact</strong></td>
<td>Allows the User to Add a Practice Admin Contact to a Practice who will be the Primary contact for APTA from the Practice side.</td>
</tr>
<tr>
<td><strong>Next ➔</strong></td>
<td>Navigates the User to the next milestone(s).</td>
</tr>
<tr>
<td><strong>Add New Provider</strong></td>
<td>Allows to add new Provider to the Practice.</td>
</tr>
<tr>
<td><strong>Previous</strong></td>
<td>Navigates the User to the previous milestone(s).</td>
</tr>
<tr>
<td><strong>Add New Location</strong></td>
<td>Allows the User to add new location(s) to the Practice.</td>
</tr>
<tr>
<td><strong>Add New Practice TIN</strong></td>
<td>Allows the User to add more than one valid TIN to the Practice.</td>
</tr>
</tbody>
</table>