Bundled Payments for Care Improvement Advanced | BPCI Advanced

CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES
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Participant Portal User Guide

August 2023

Guide Outline

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- Helpful Tips Before You Begin
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  - CMS Identity Management Account Confirmation
  - Create a CMS Identity Management Account
- Section 2 – Registering for the Participant Portal
- Section 3 – Logging into the Participant Portal
- Section 4 – Navigating the CMS Participant Portal
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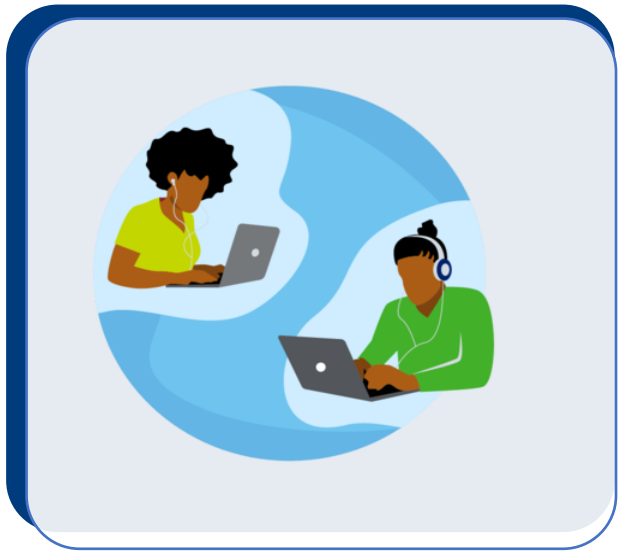
  - Profile
  - Deliverables
  - Announcements
  - Legal Documents
  - Document Library
- Need Help?
- Appendix

Portal Link: https://app.innovation.cms.gov/bpciadv

The **BPCI Advanced Participant Portal** is an online platform that allows users to:

- Access and review organizational information
- Verify Clinical Episode selection
- Update and manage points of contact (POCs)
- Manage and submit Model deliverables
- Access legal documents related to BPCI Advanced participation
- Access Document Library that contains Model communications and reference material



Use this guide if you are a:

- New user who has never navigated the Participant Portal
- Former BPCI Advanced Participant that is reapplying to BPCI Advanced in Model Year 7
- Current Participant who is interested in knowing more about the Participant Portal

Helpful Tips Before You Begin

- Users with an Identity Management (IDM) account for the Application Portal and/or Data Portal should use the same IDM account in the Participant Portal.
- For security reasons, users are automatically logged out of the portal if there is no activity for more than 30 minutes.
- Please ensure that your web browser is up to date and is one of the following browsers:
  - Microsoft Edge
  - Google Chrome
  - Mozilla Firefox
  - Apple Safari
- CMS updated their IDM password policy on April 25, 2023, to increase the minimum length from eight characters to 15 characters. Also, special characters are now optional instead of required.
- Passwords can only be changed **once every 24 hours**.
- The full process of creating a CMS IDM account, creating a CMS Participant Portal account and navigating the Participant Portal is estimated to take approximately 30 minutes. Please note, each section includes a time estimate for completion.

Section 1 – Registering for CMS IDM

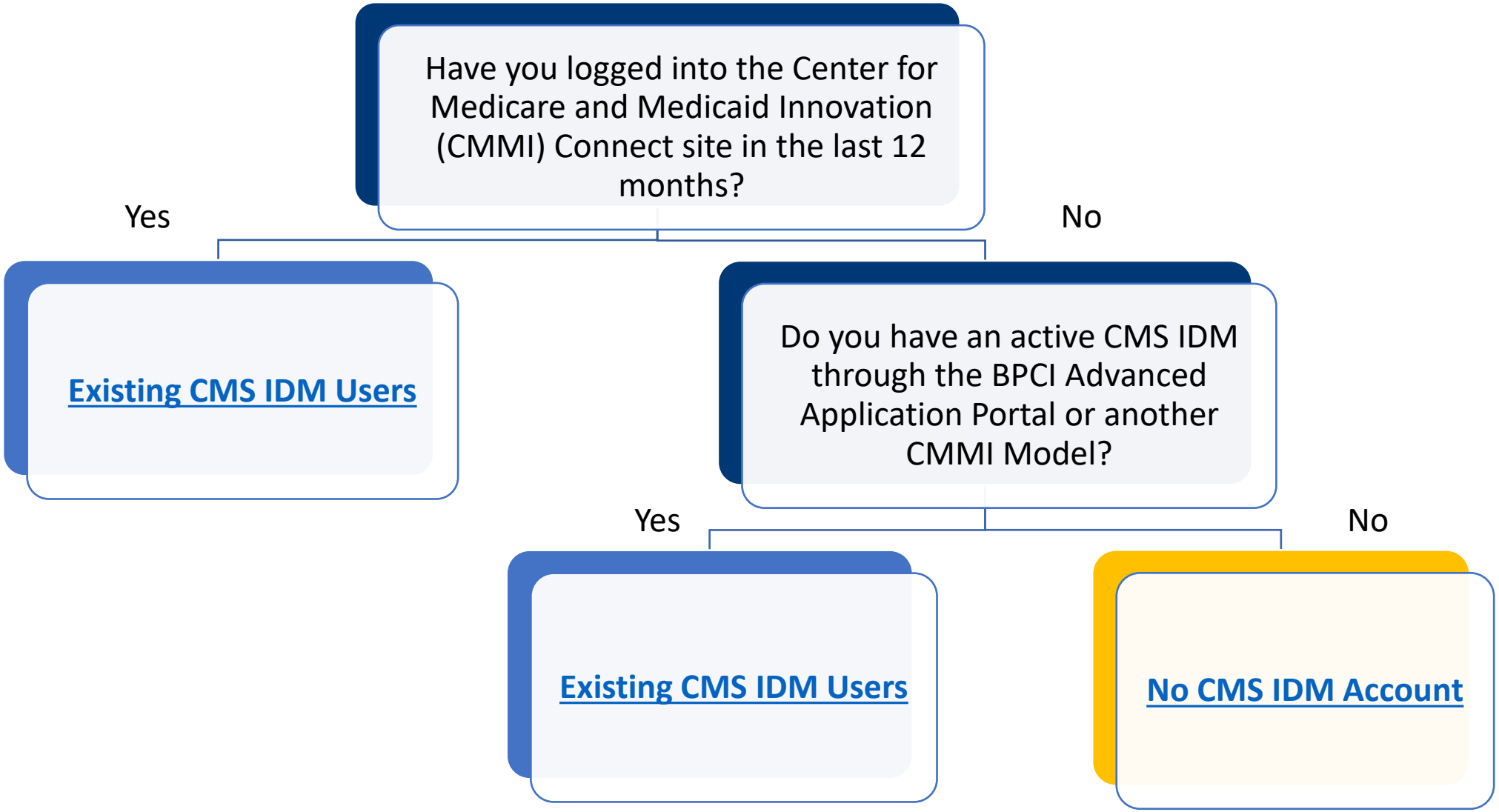
Step 1: CMS IDM Account Confirmation – Includes a flowchart for determining if you have a CMS IDM account

Step 2: Create a CMS IDM Account – Includes instructions for creating a CMS IDM account

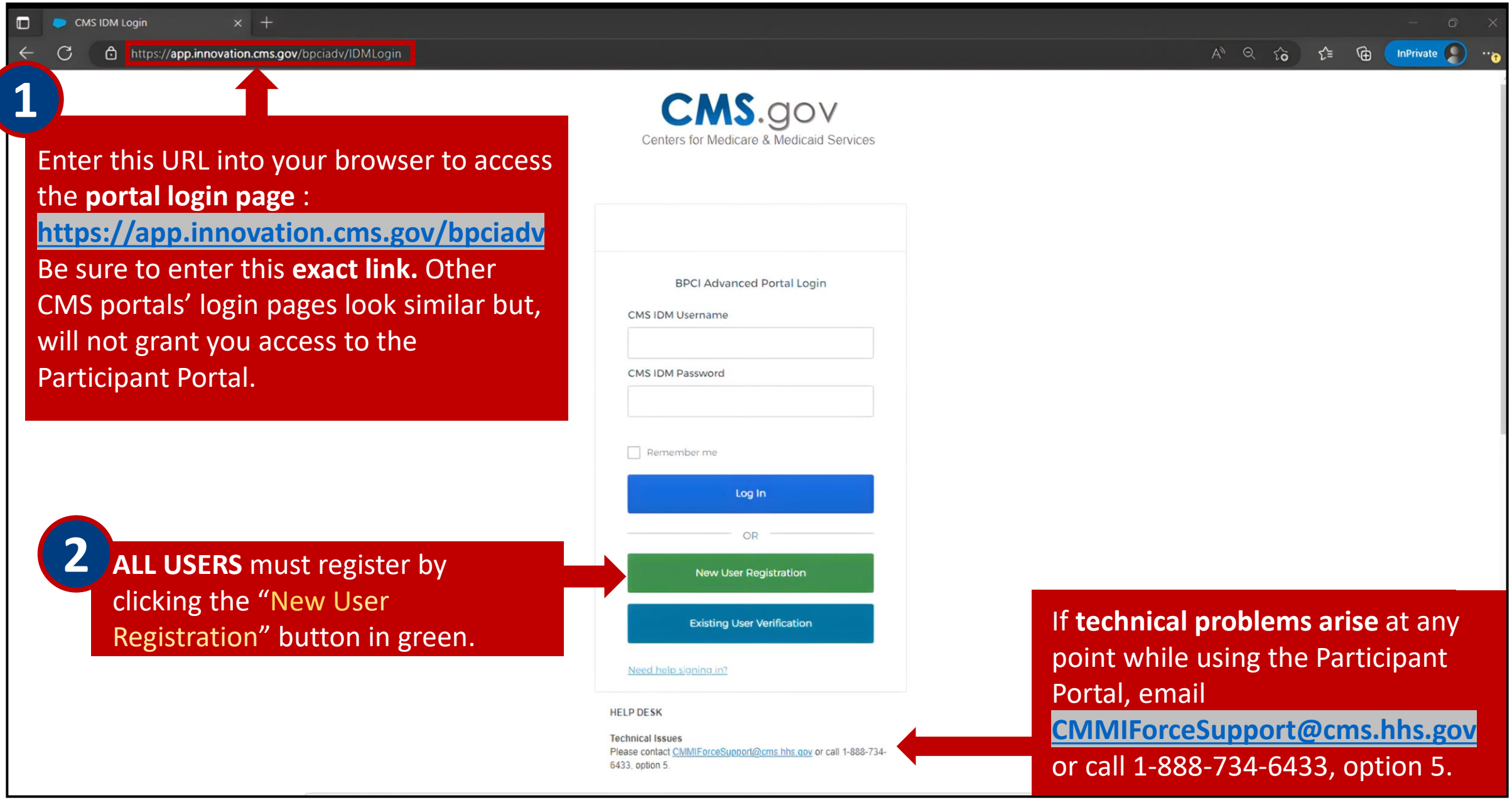
Time estimate: 4 minutes (7 slides)

CMS IDM Account Verification

Use the flowchart to determine if you have a CMS IDM account and click on the hyperlink to navigate to the specific instructions.



Create a CMS IDM Account



1 Enter this URL into your browser to access the **portal login page** : https://app.innovation.cms.gov/bpciadv Be sure to enter this **exact link.** Other CMS portals' login pages look similar but, will not grant you access to the Participant Portal.

2 **ALL USERS** must register by clicking the "New User Registration" button in green.

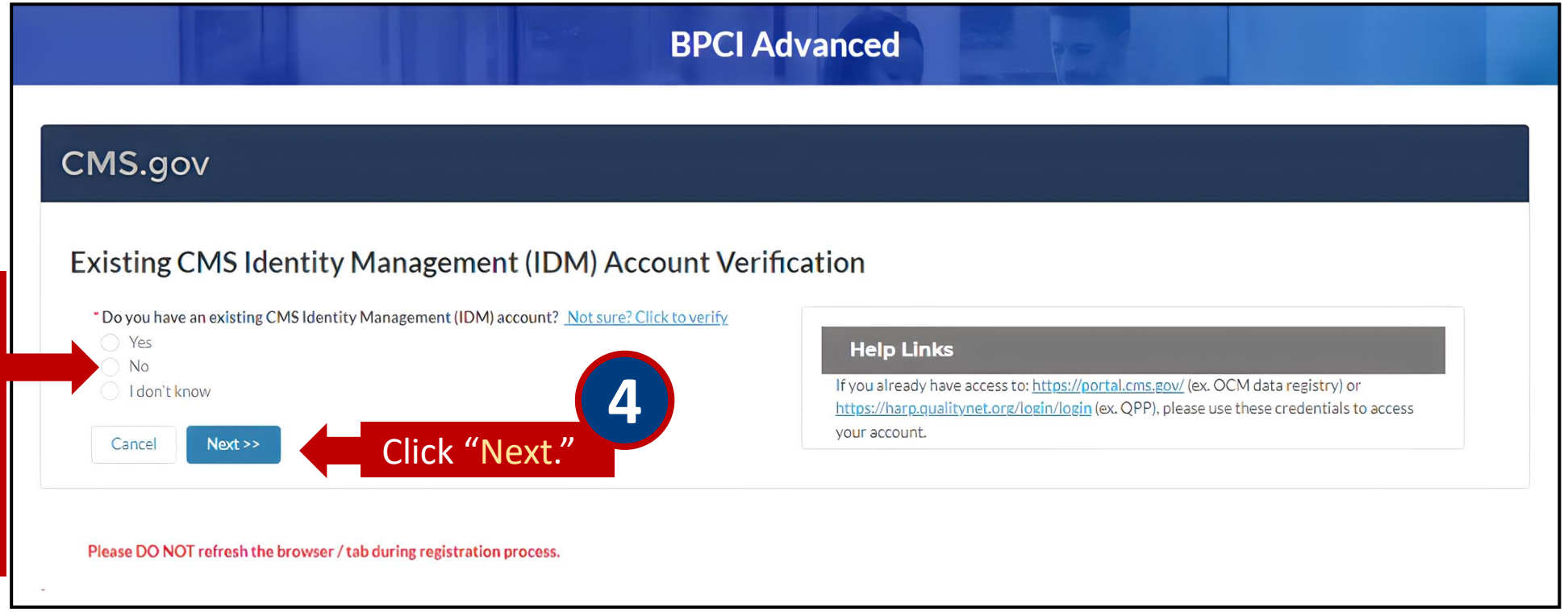
If **technical problems arise** at any point while using the Participant Portal, email CMMIForceSupport@cms.hhs.gov or call 1-888-734-6433, option 5.

Create a CMS IDM Account (cont. 1)

Please DO NOT refresh the browser/tab during the registration process.

3

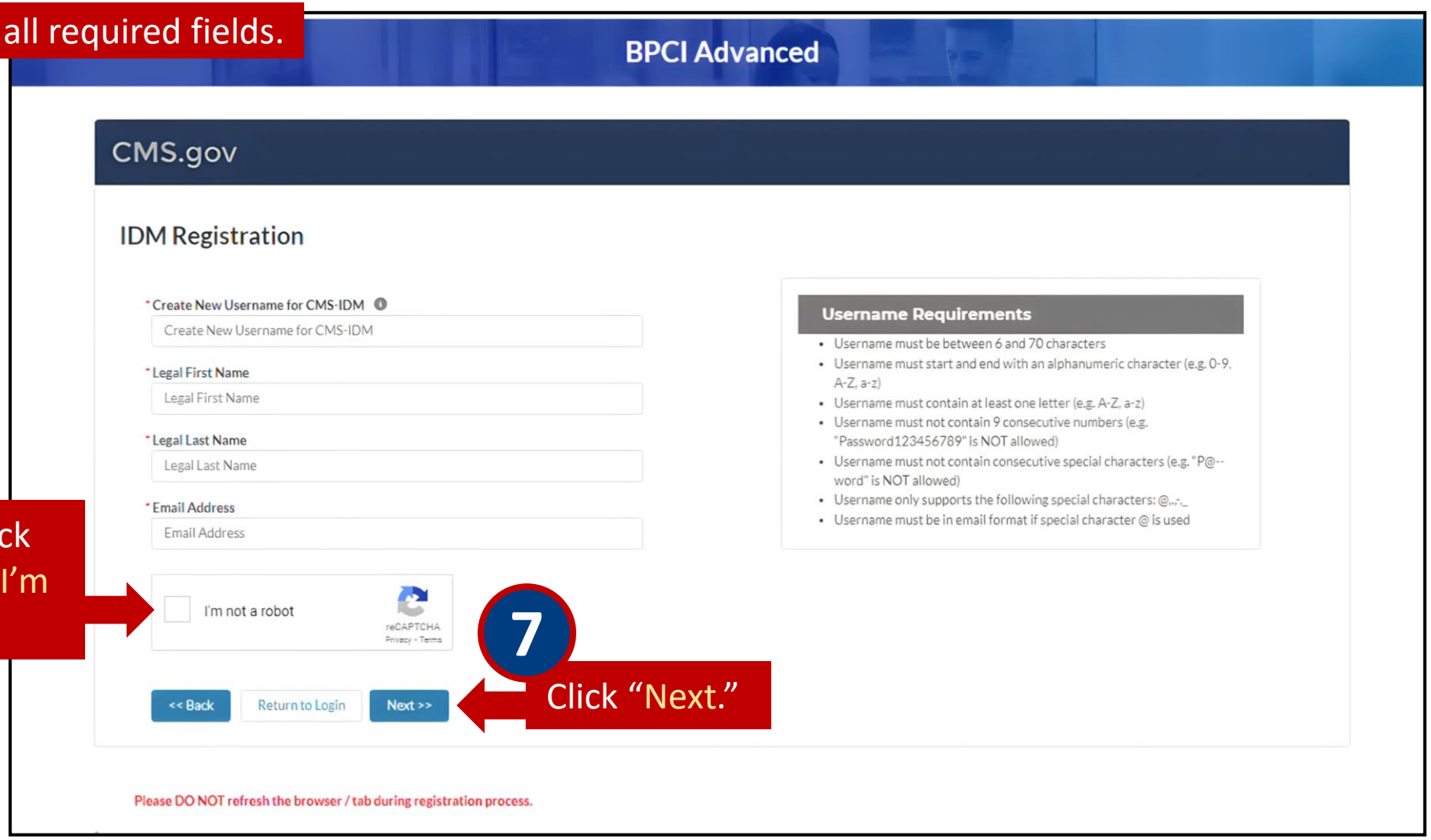
As a new user attempting to access the BPCI Advanced Participant Portal, select “No.”



If you already have a CMS IDM account, ***click here*** to navigate to Section 2 – Registering for the Participant Portal.

Create a CMS IDM Account (cont. 2)

5 Complete all required fields.



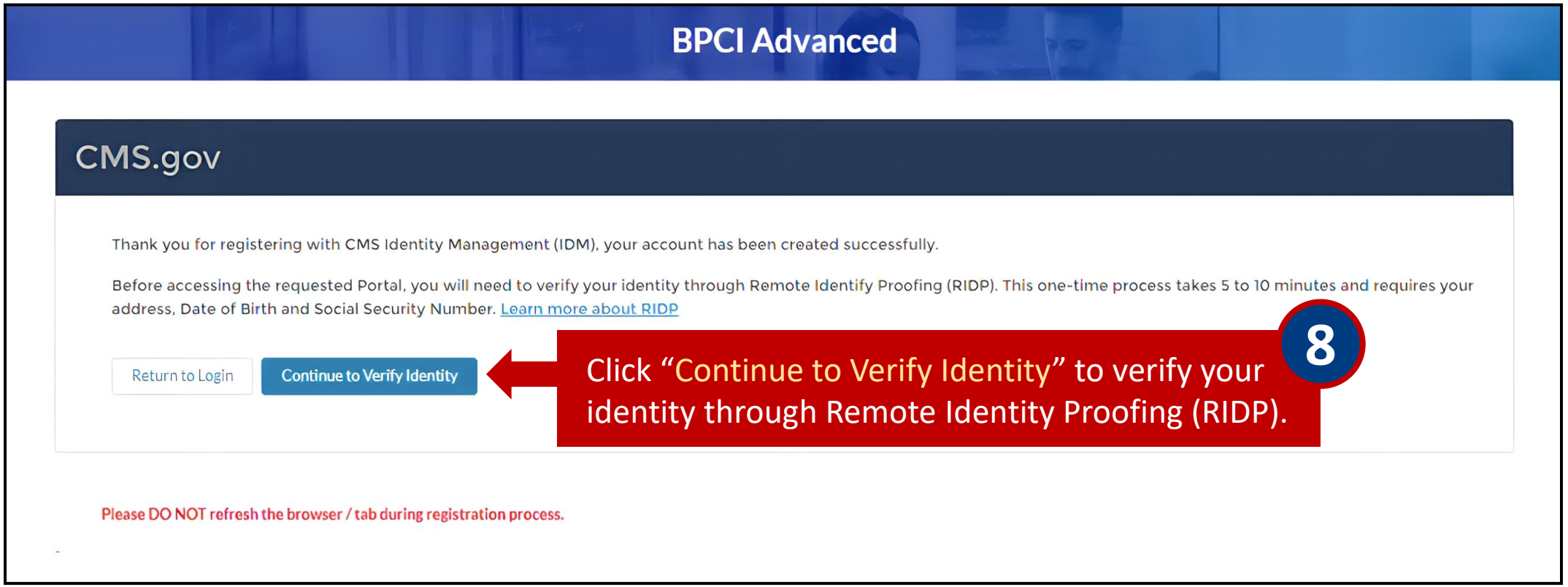
6 Click the check box next to "I'm not a robot."

7 Click "Next."

CMS restricts the use of YOPmail and personal email addresses (AOL, Yahoo, Gmail, etc.). We require the use of professional or organizational email addresses. The username does NOT have to be your email address.

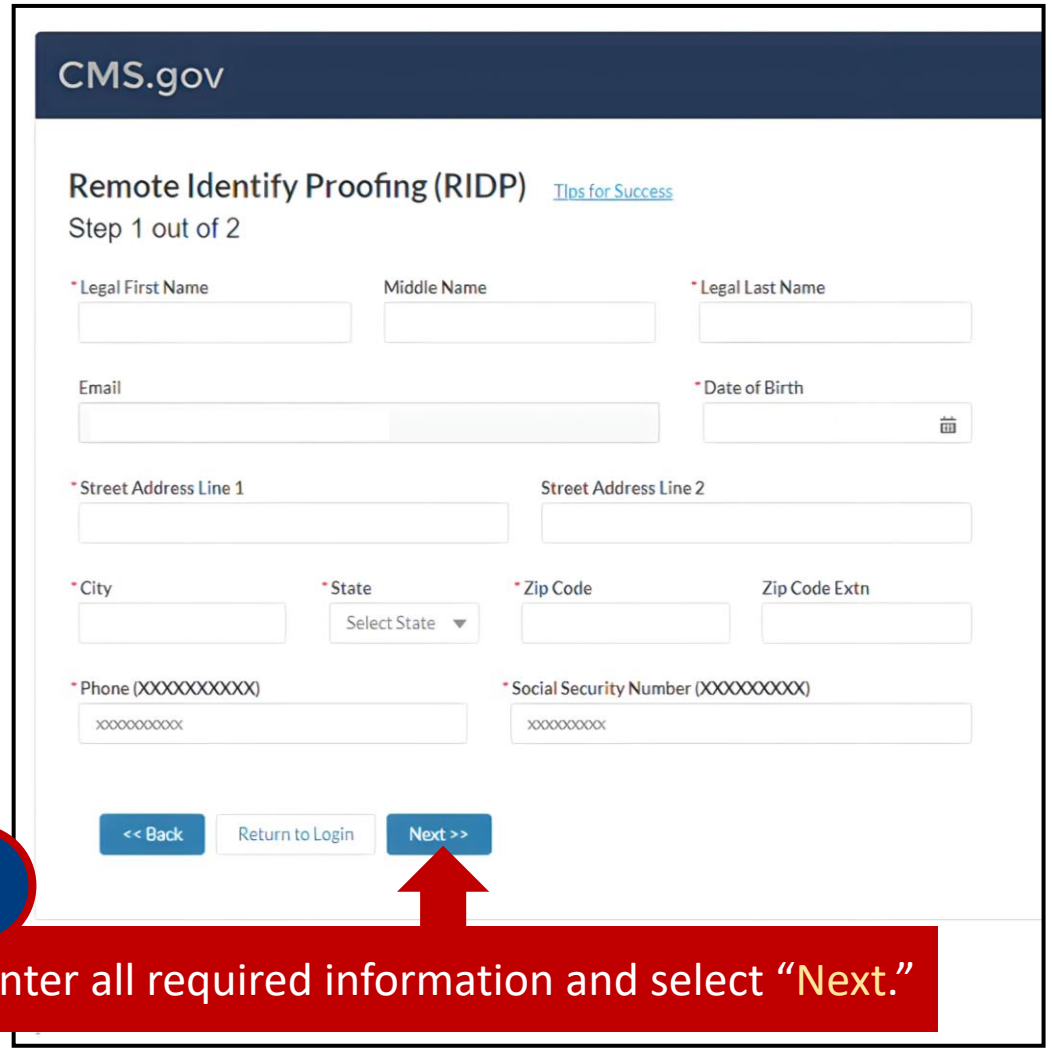
Create a CMS IDM Account (cont. 3)

The system will display a message that indicates the account was successfully created.



Create a CMS IDM Account - RIDP

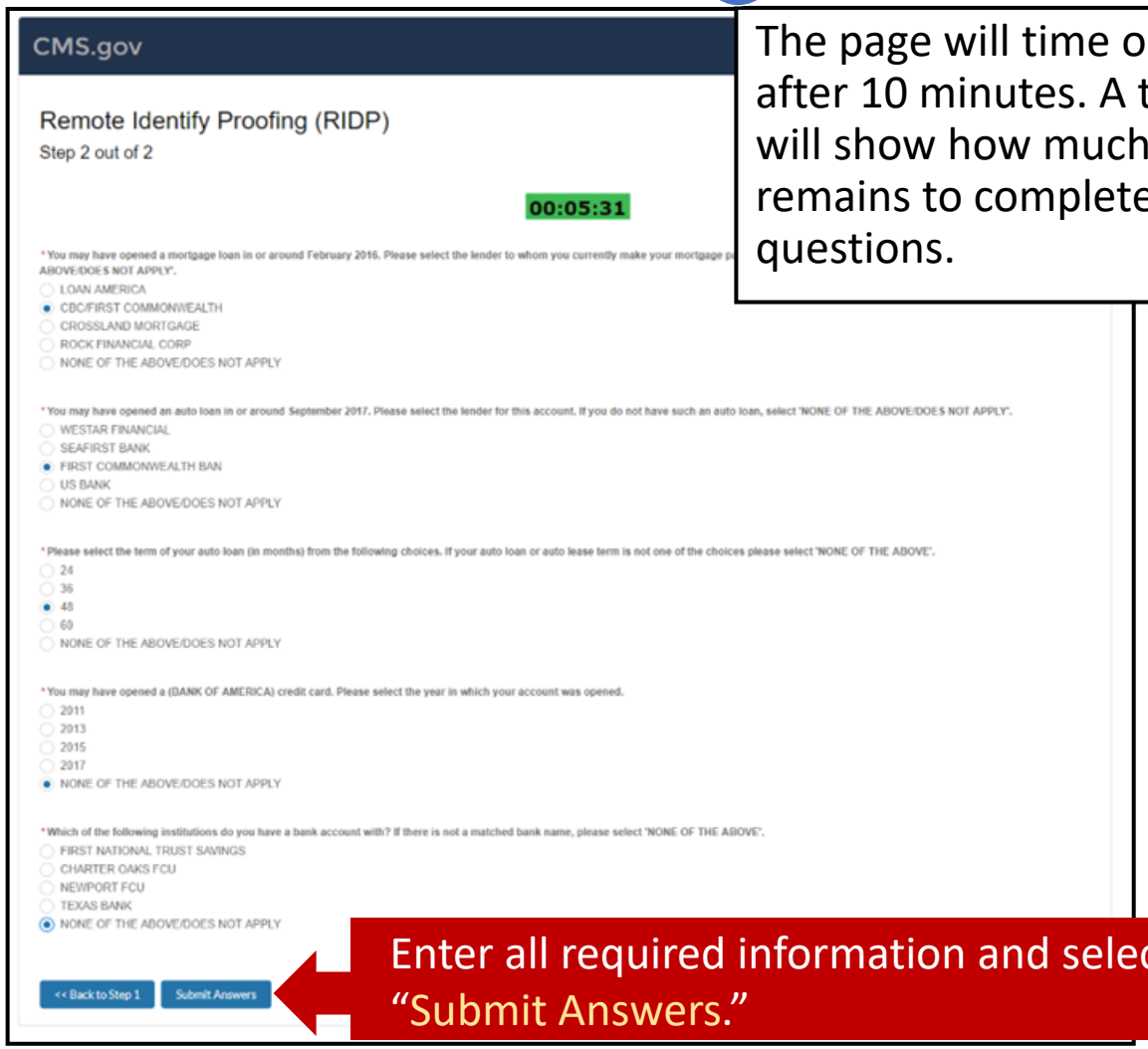
CMS uses the Experian RIDP service to confirm your identity. Please note, the identity verification questions will be specific to you. Sample questions are displayed below.



9

Enter all required information and select "Next."

The page will time out after 10 minutes. A timer will show how much time remains to complete the questions.

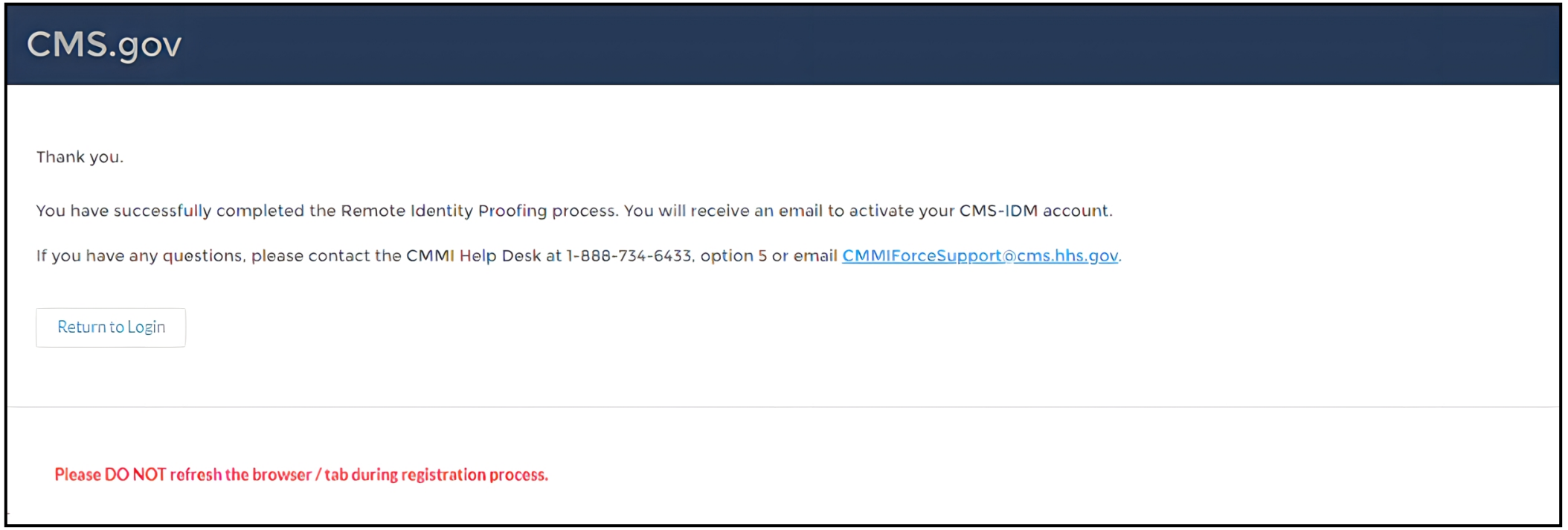


10

Enter all required information and select "Submit Answers."

Create a CMS IDM Account - RIDP (cont.)

If you have answered the identity verification questions correctly, a notification will display that you have successfully completed the verification process. You will receive an email to activate your CMS IDM account and be redirected to the portal login page. **Should the RIDP verification process fail,** you will be prompted to contact Experian (1-866-578-5409) for identity proofing via phone.

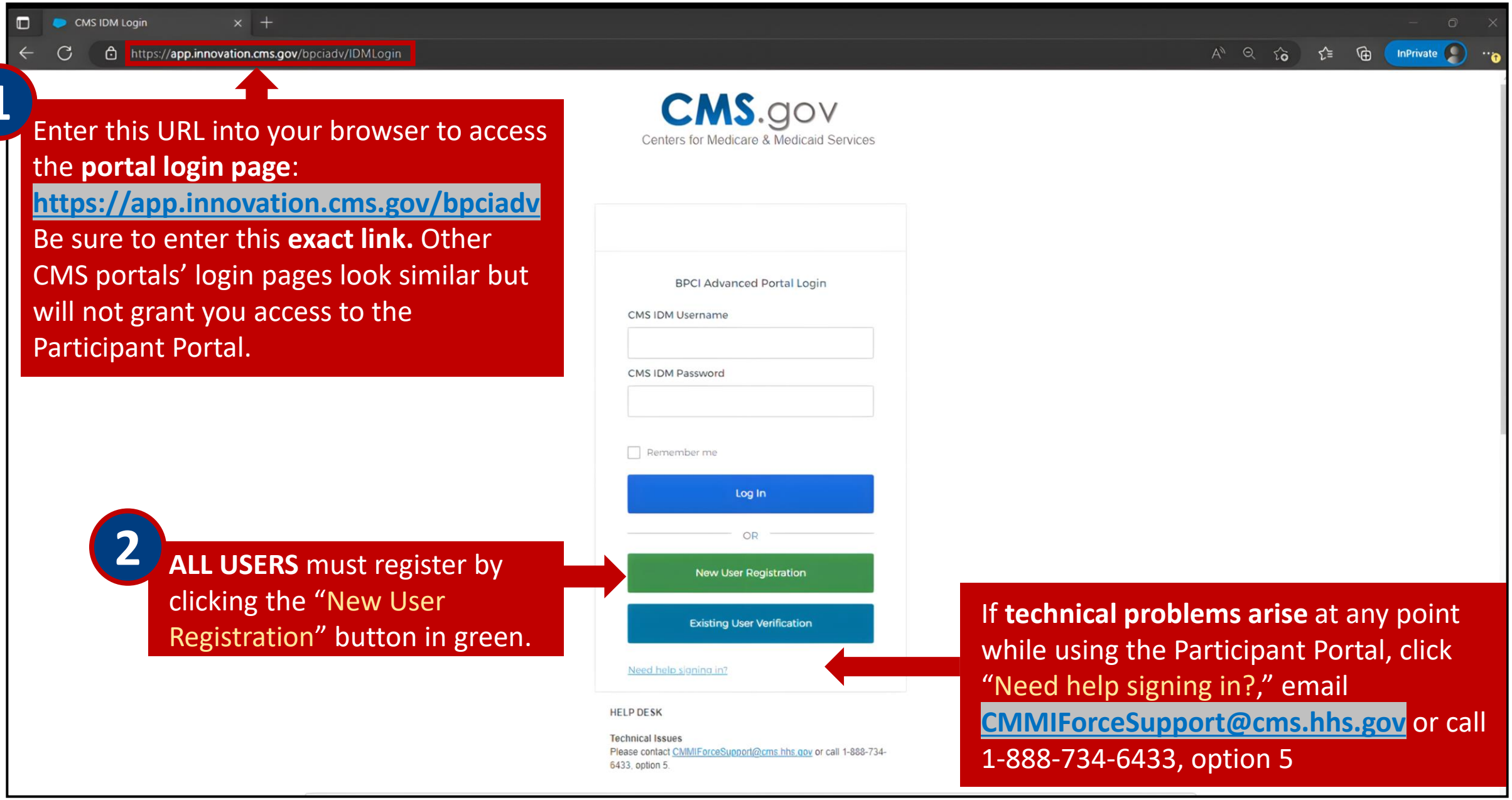


Once you receive the email, click ***here*** to navigate to Section 3 – Logging into the Participant Portal.

Section 2 – Registering for the Participant Portal

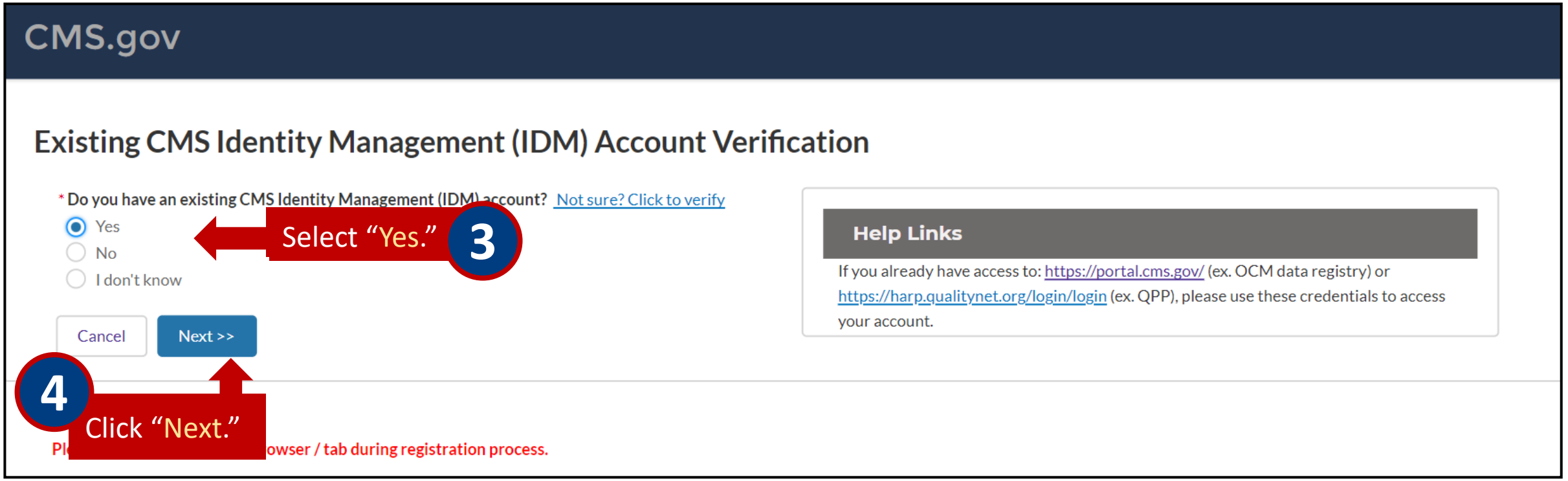
Time estimate: 5 minutes (6 slides)

Registering for the Participant Portal



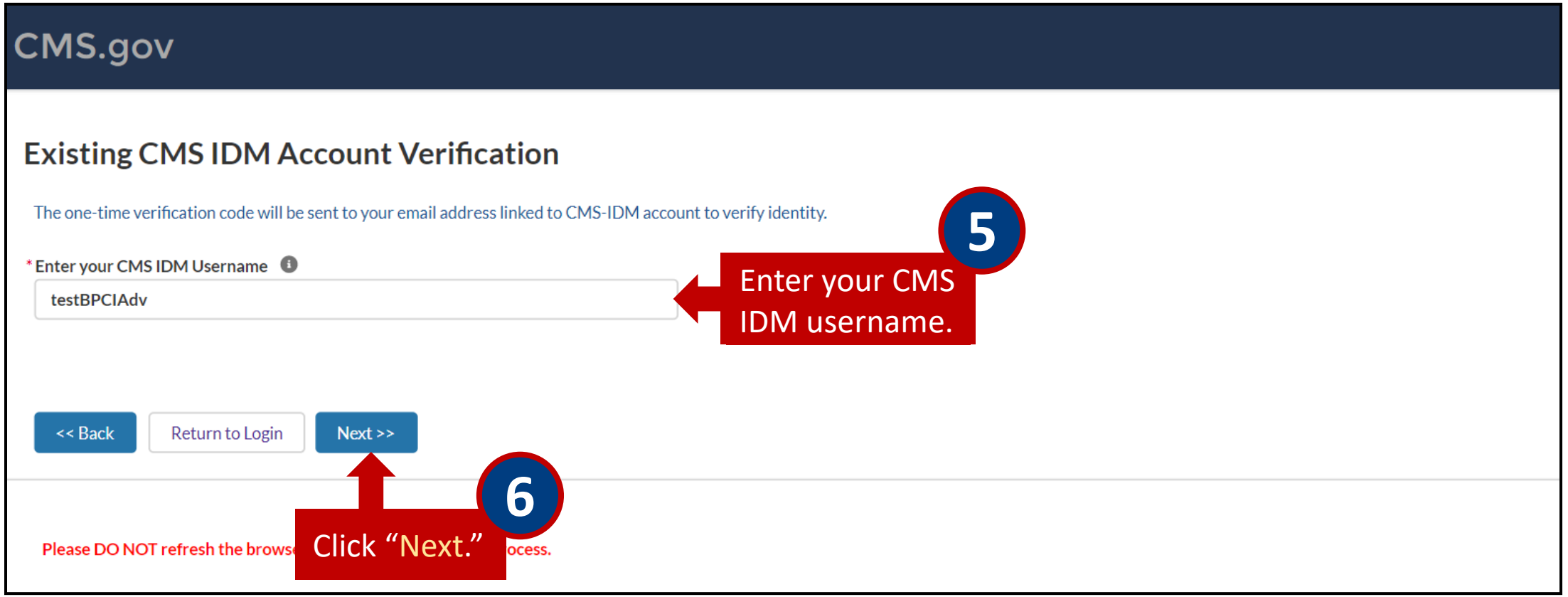
Registering for the Participant Portal (cont.)

Please DO NOT refresh the browser / tab during registration process.

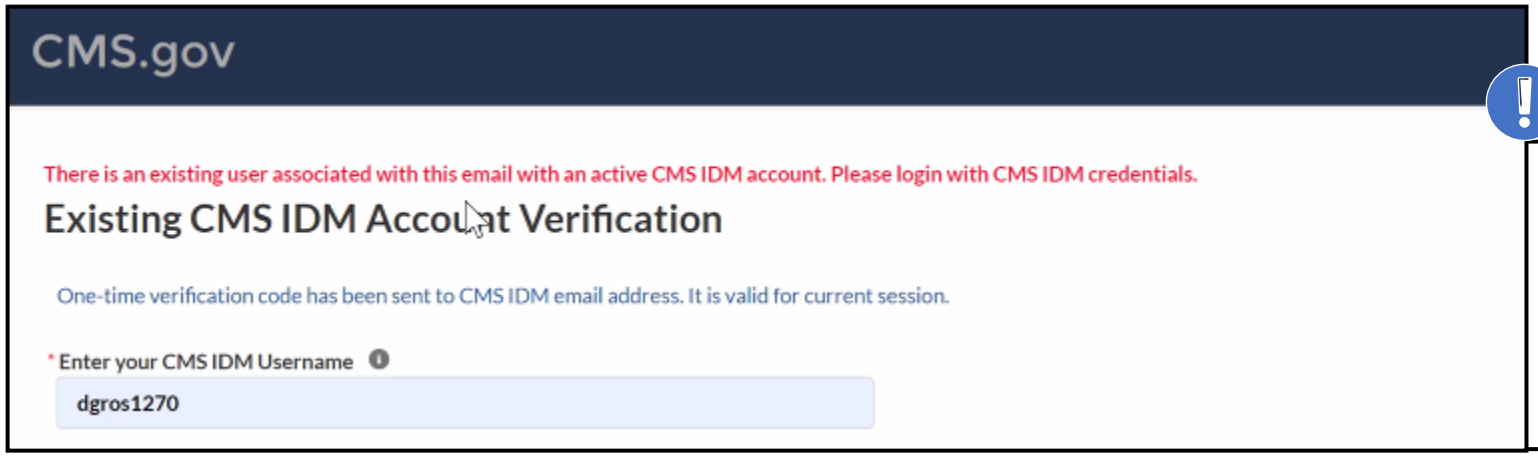


If you do not have CMS IDM access, select "No" and click ***here*** to navigate to Section 1 – Registering for CMS IDM.

Verifying Your CMS IDM Account

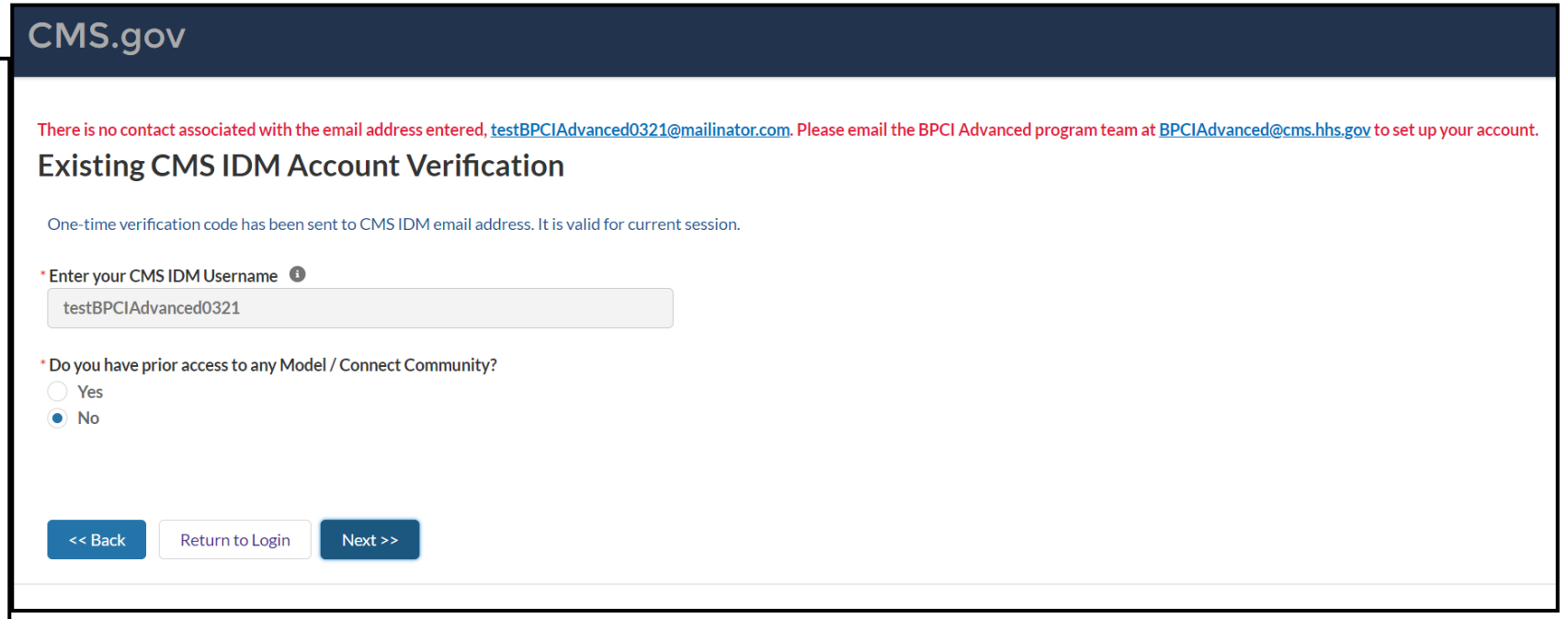


Verifying Your CMS IDM Account (cont. 1)



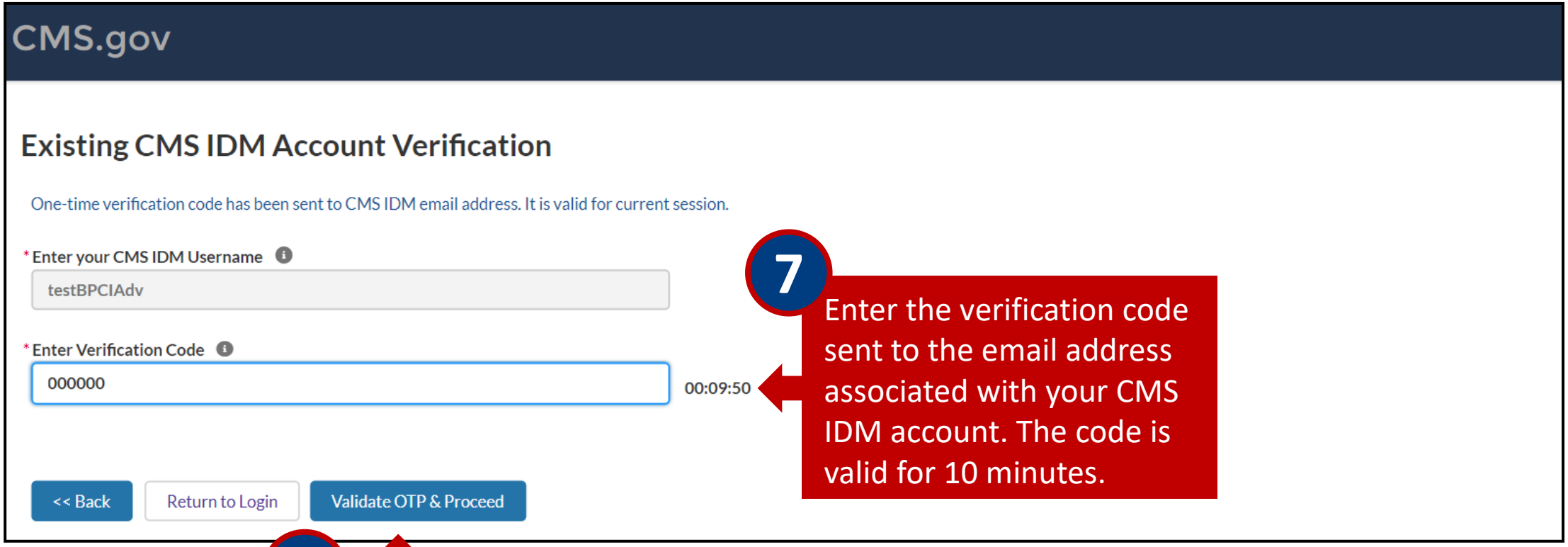
If this error appears, ***click here*** to proceed to Section 3 of this user guide – Logging into the Participant Portal.

If this error appears, you have not been added as a POC for the BPCI Advanced Model you must reach out to your organization's primary POC to be added. If you are a new Applicant your organization's Primary POC is the individual listed on the application as the Application Contact. If you do not know who your organization's primary POC is, email **BPCIAdvanced@cms.hhs.gov.**



Please see **slide 27** for more information on how Primary POCs can add additional POCs in the Participant Portal.

Verifying Your CMS IDM Account (cont. 2)

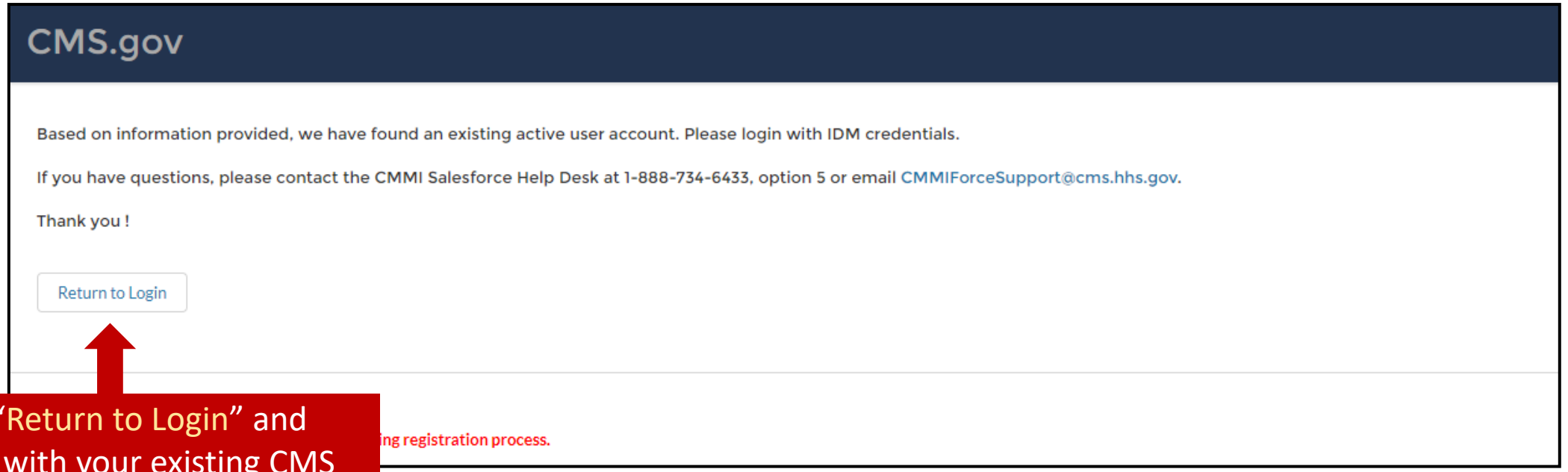


7 Enter the verification code sent to the email address associated with your CMS IDM account. The code is valid for 10 minutes.

8 Click "Validate OTP & Proceed."

Verifying Your CMS IDM Account (cont. 3)

If you have completed registration, you will see this page and can log into the BPCI Advanced Participant Portal.



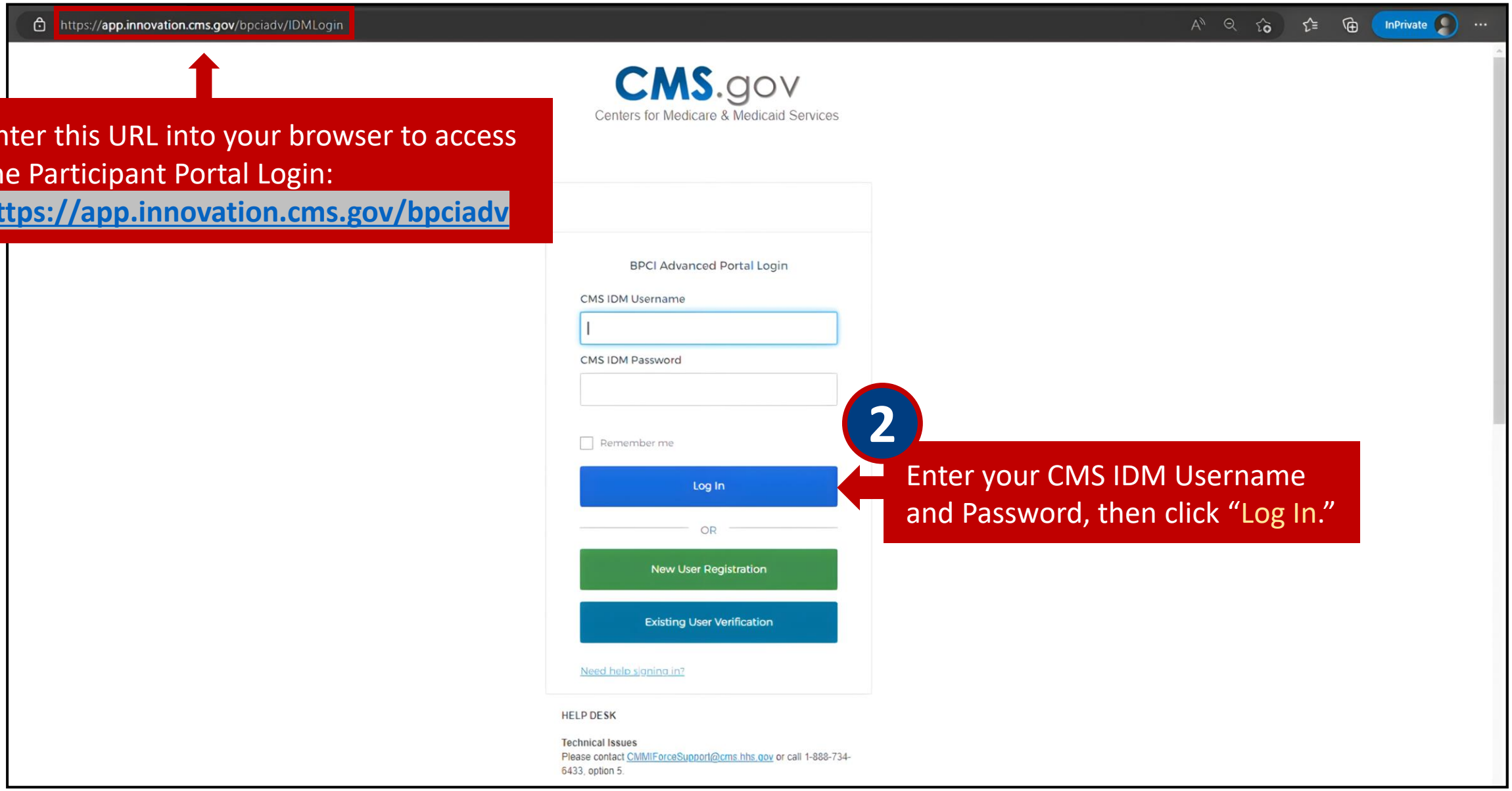
9

Click “Return to Login” and log in with your existing CMS IDM credentials.

Section 3 – Logging into the Participant Portal

Time estimate: 2 minutes (3 slides)

Logging into the Participant Portal



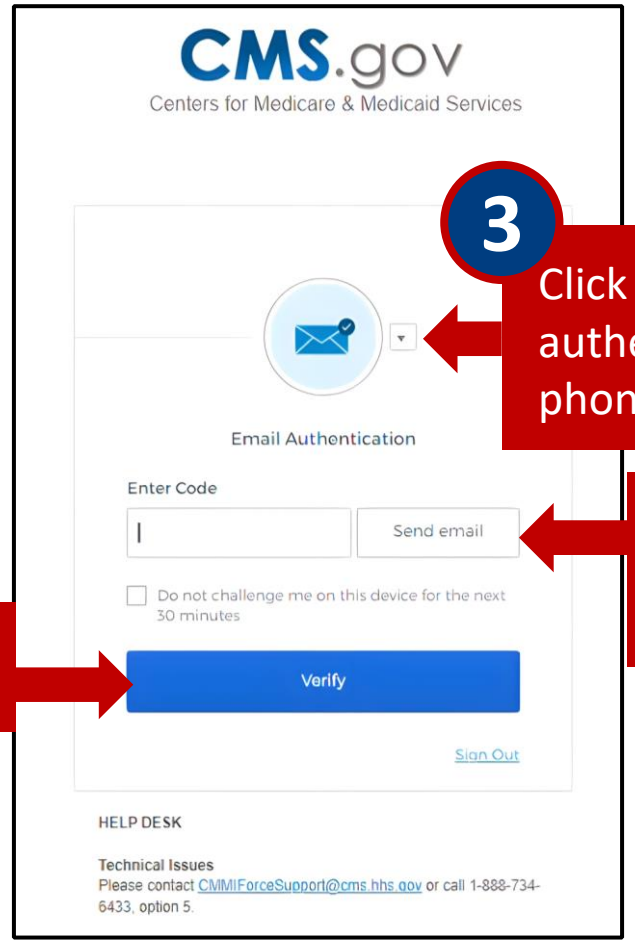
1

Enter this URL into your browser to access the Participant Portal Login: https://app.innovation.cms.gov/bpciadv

2

Enter your CMS IDM Username and Password, then click “Log In.”

Logging into the Participant Portal (cont. 1)



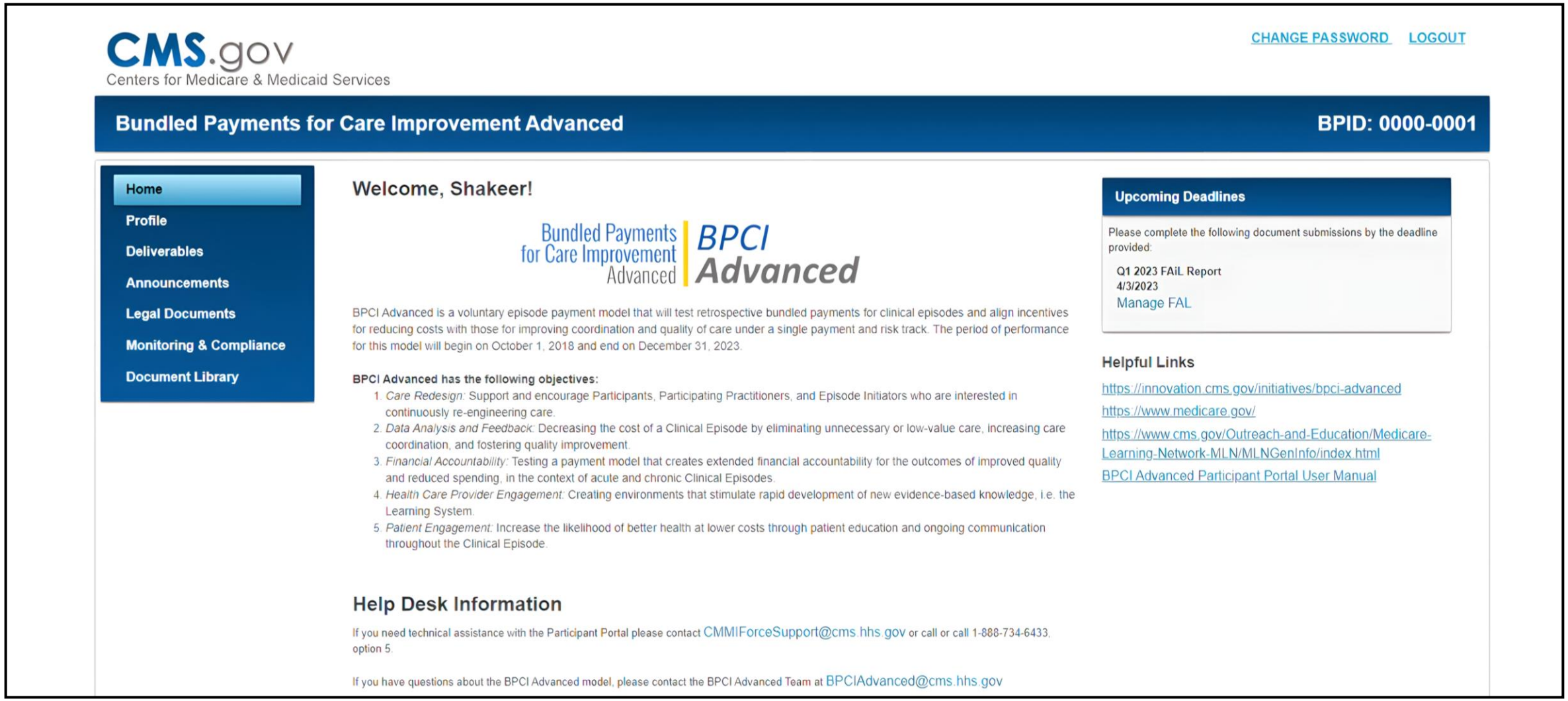
3 Click the drop-down arrow to select your authentication method (text message, phone call, email, etc.).

4 Click "Send" and check your authentication method to see your security code.

5 Enter the security code and click "Verify."

Logging into the Participant Portal (cont. 2)

After logging in, you will be directed to the BPCI Advanced Participant Portal.



Section 4 – Navigating the Participant Portal

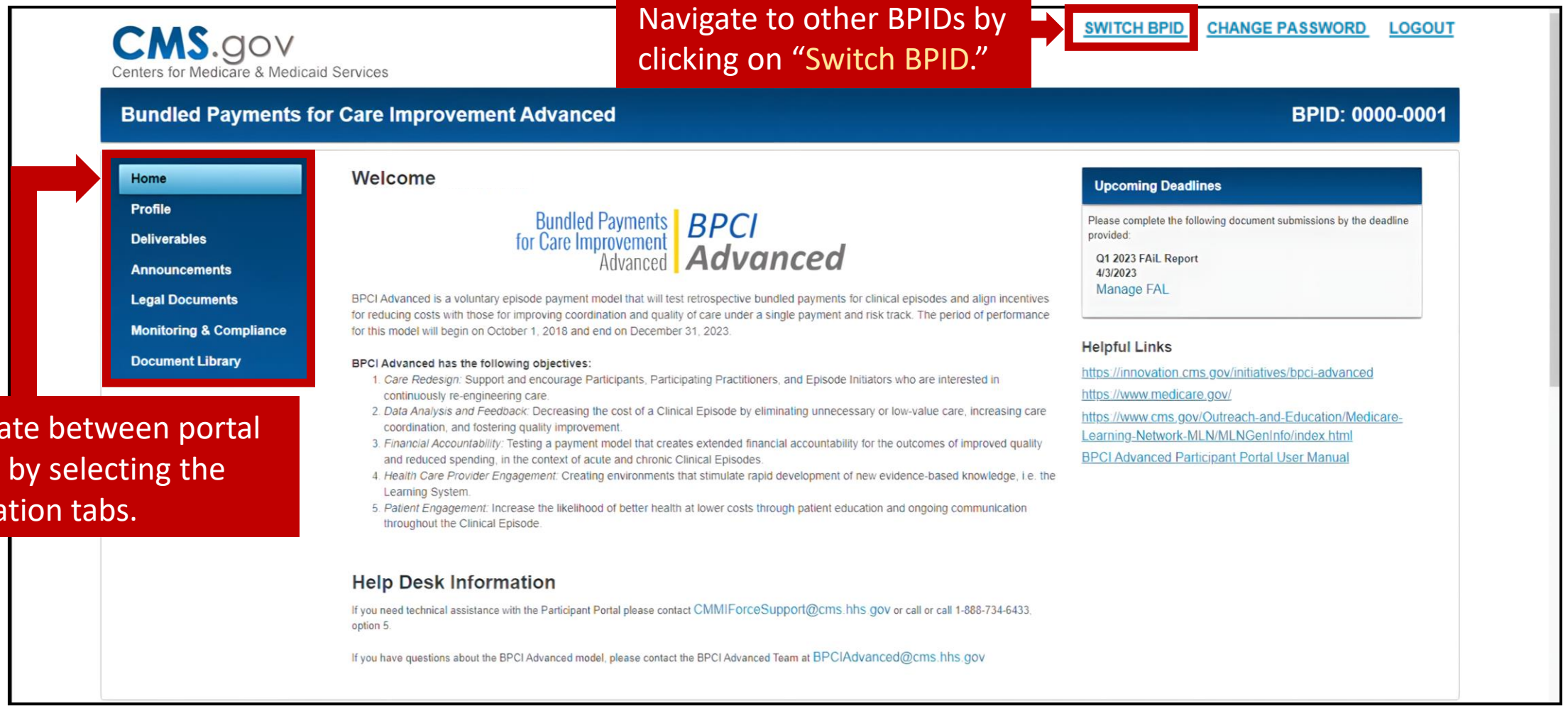
This section will support you in uploading and downloading documents on the following sections of the BPCI Advanced Participant Portal:

- *Homepage*
- *Profile*
- *Deliverables*
- *Announcements*
- *Legal Documents*
- *Document Library*

Time estimate: 10 minutes (17 slides)

Homepage

Navigate to other BPIDs by clicking on "Switch BPID."

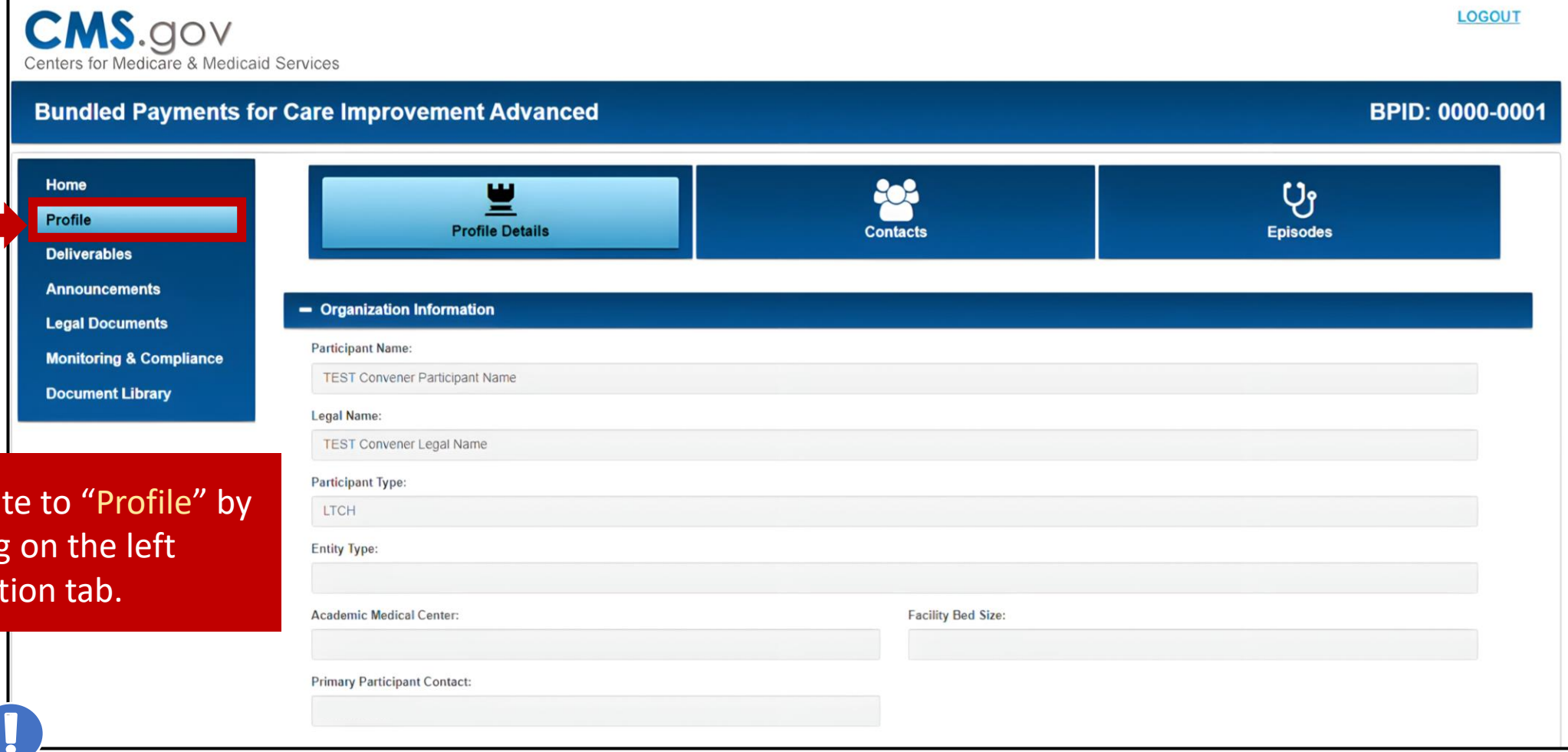


Navigate between portal pages by selecting the navigation tabs.

"Switch BPID" is visible only for POCs associated with multiple BPIDs.

Profile

The Profile section displays organization information, addresses and Participant information. This information is automatically populated from your organization's BPCI Advanced application.



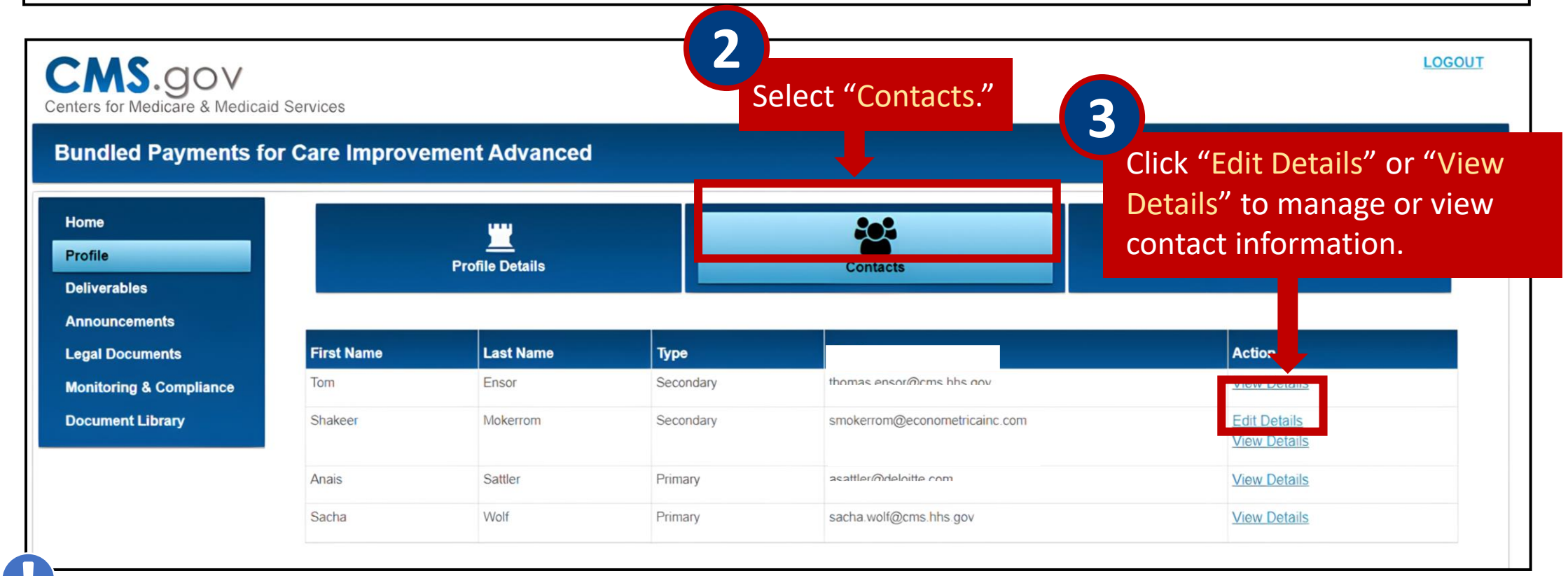
1

Navigate to "Profile" by clicking on the left navigation tab.

Profile Details fields are not editable. To request changes, please email the BPCI Advanced Help Desk.

Profile – Update POCs

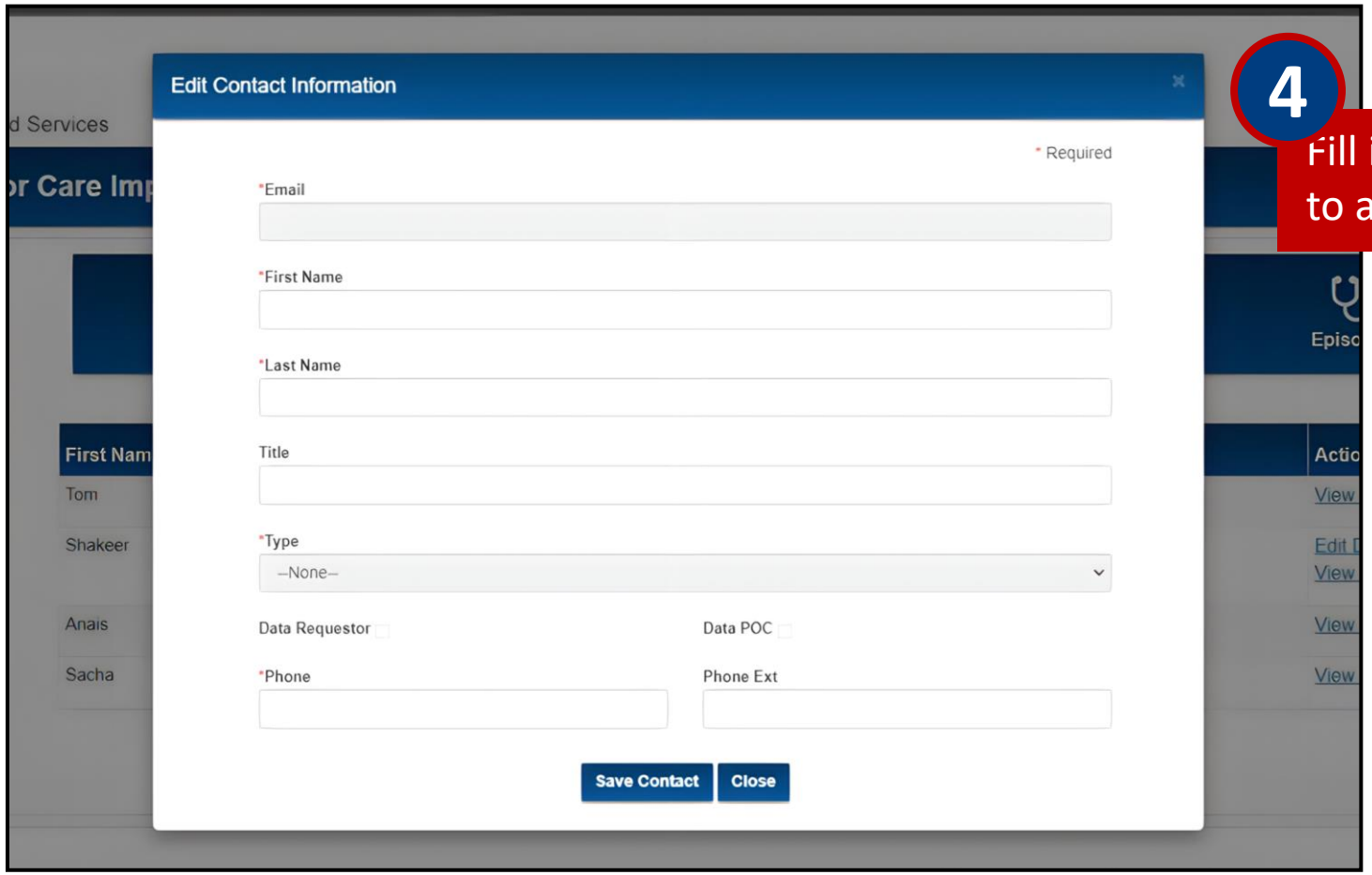
The Contacts section displays individuals designated as POCs in the Participant Portal which are currently active. An organization may only have two “Primary POCs” and up to five “Secondary POCs” but may have unlimited “Other POCs”.



Primary POCs can create new contacts, remove listed contacts and edit any listed contact’s “Phone,” “Phone Ext.” and “Type.” Secondary POCs can update their own “Phone,” “Phone Ext.” and “Type” fields only. **“Other POCs” will receive BPCI Advanced emails but will not have access to the Participant Portal.**

Profile – Update POCs (cont.)

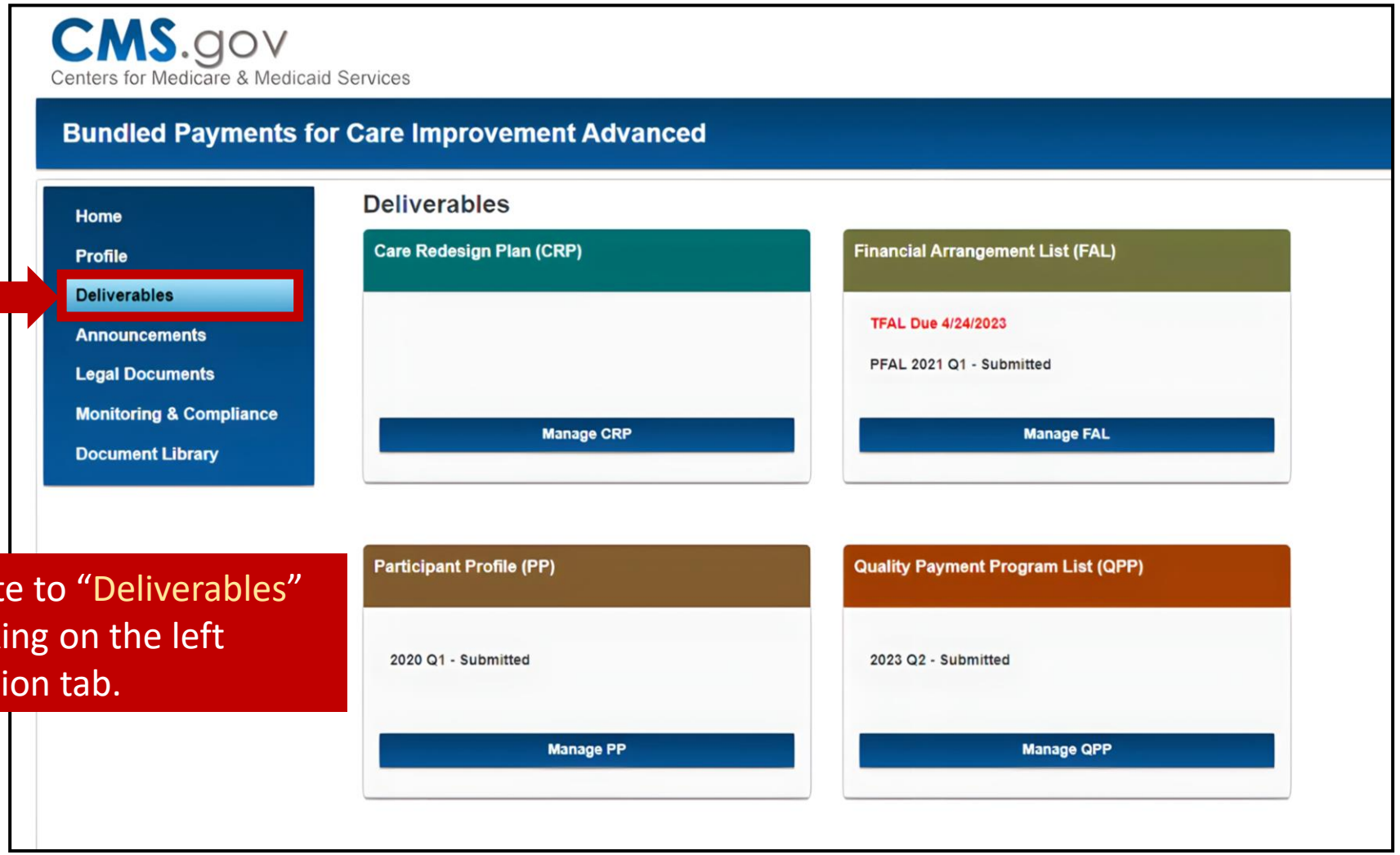
Your organization's Primary POCs are responsible for keeping contact information up to date. CMS strongly suggests always having 2 active Primary POCs.



4 Fill in required information to add/edit a POC.

Deliverables

From the Deliverables section, you may download templates, upload deliverables and upload supporting documentation.

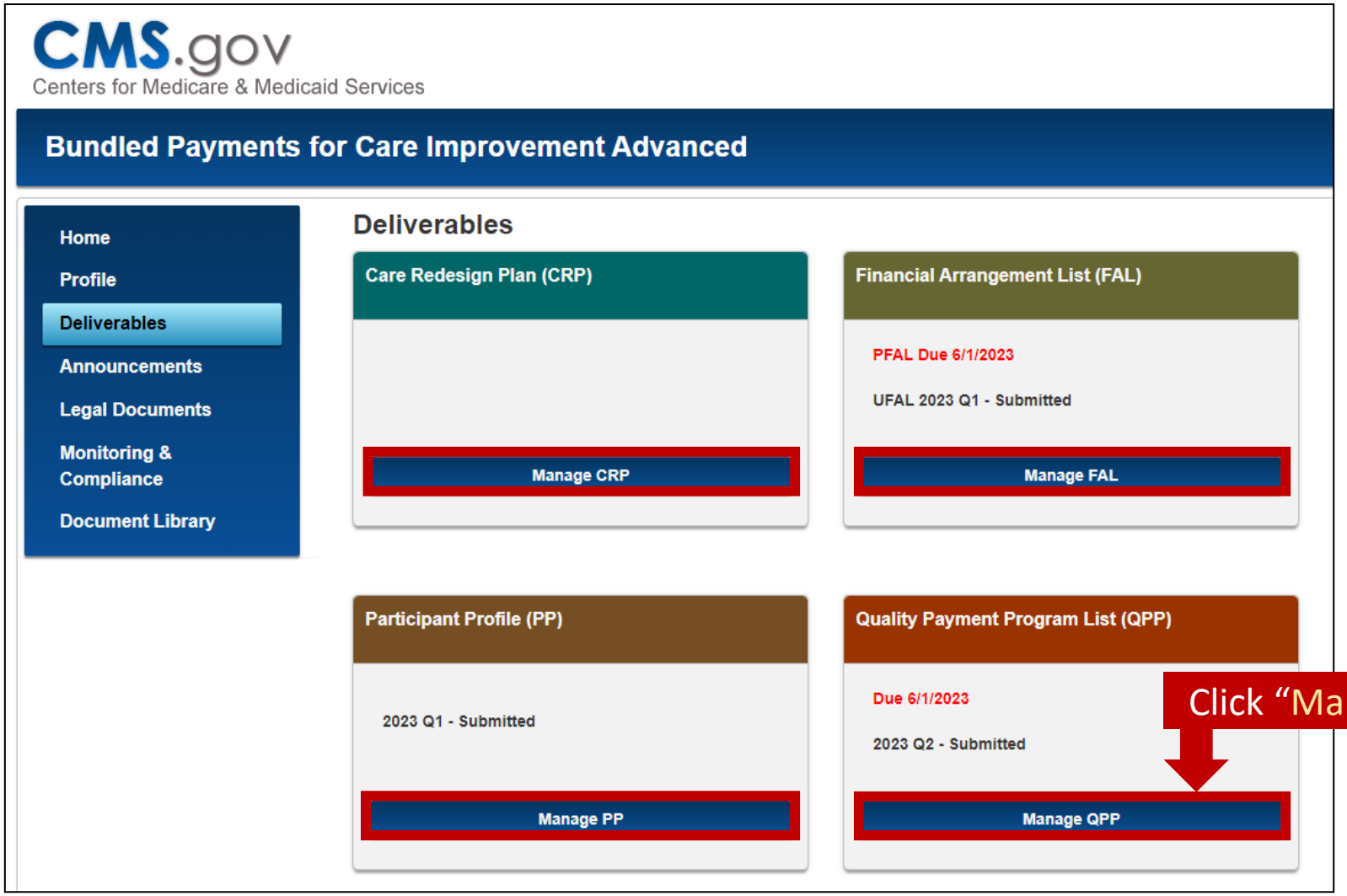


5

Navigate to "Deliverables" by clicking on the left navigation tab.

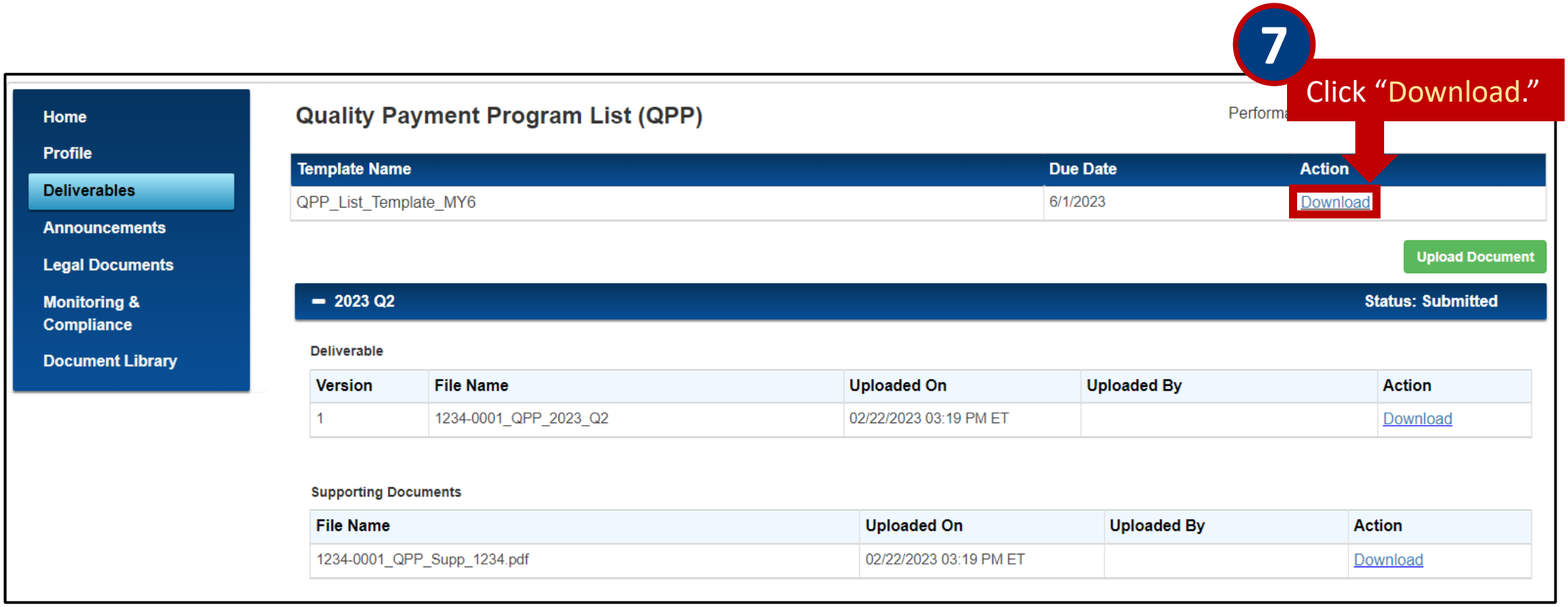
Deliverables (cont.)

This example demonstrates the process for submitting the Quality Payment Program (QPP) List. The tiles may include due dates. If no due date is displayed, then you are not be able to upload the deliverable. The submission process is the same for the **Financial Arrangement List (FAL)** and the **Participant Profile (PP).** The **Care Redesign Plan (CRP)** uses a different upload method, which will be demonstrated later.



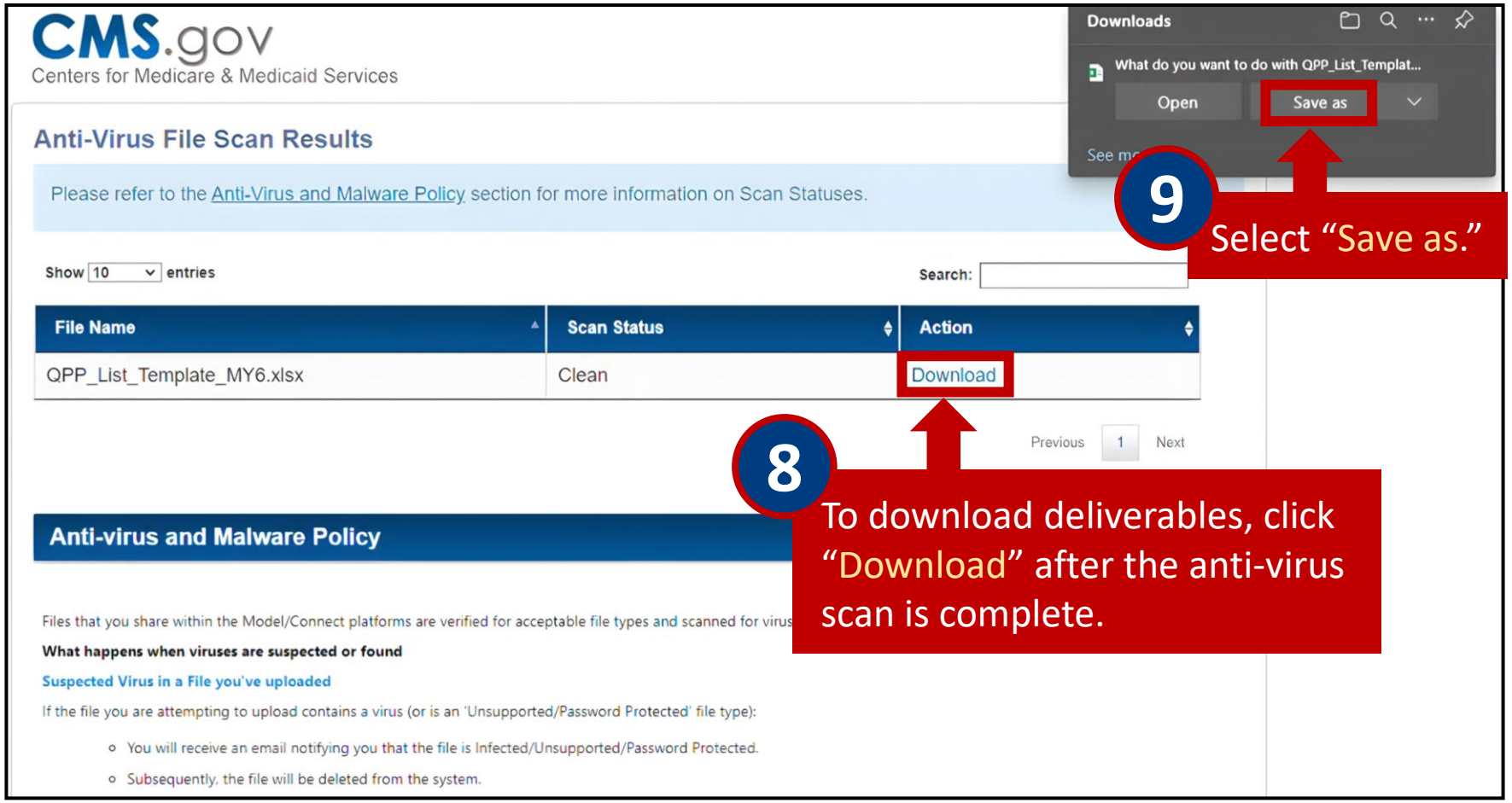
Deliverables – QPP

This example demonstrates the process for downloading the current QPP List template.

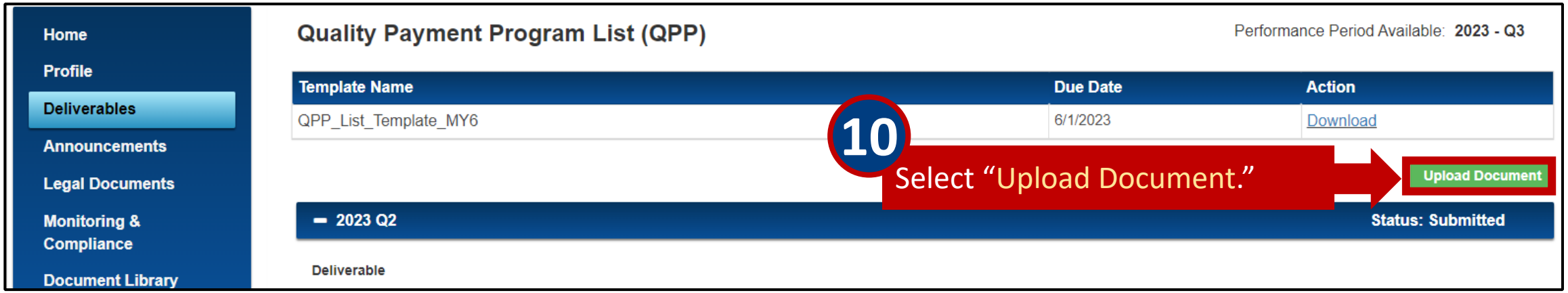


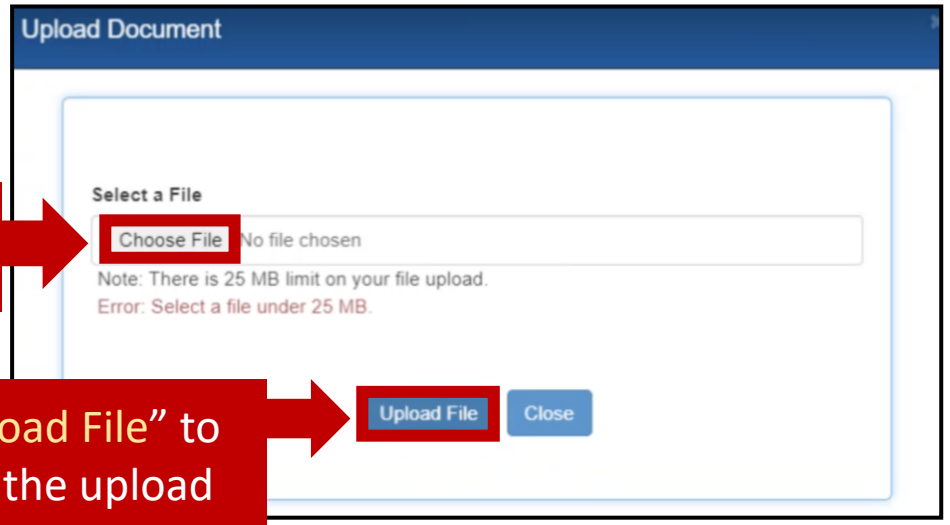
Deliverables – QPP (cont. 1)

Before downloading items from the Portal, an anti-virus scan will occur. Once the scan is complete, you may download the document.



This example demonstrates the process of uploading a QPP List. The "Upload Document" button will only display during open submission periods. An upload button for supporting documentation only becomes available after a Participant uploads a deliverable.



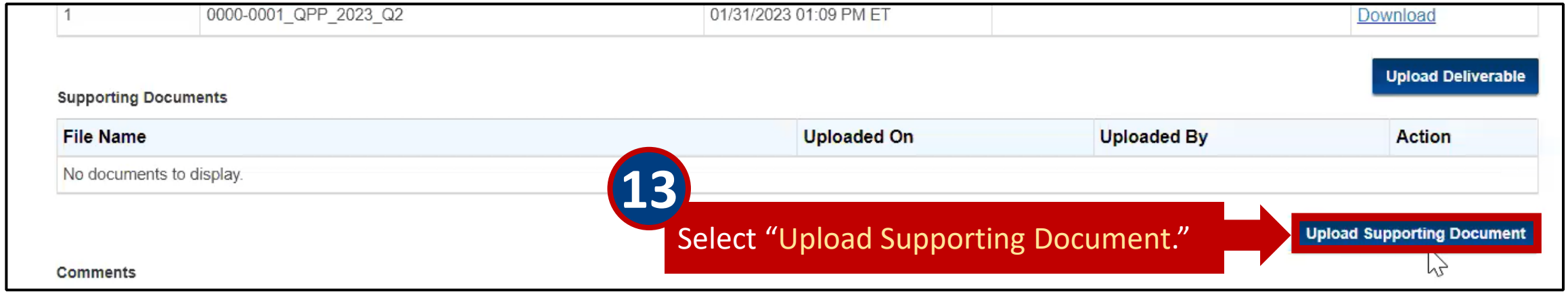


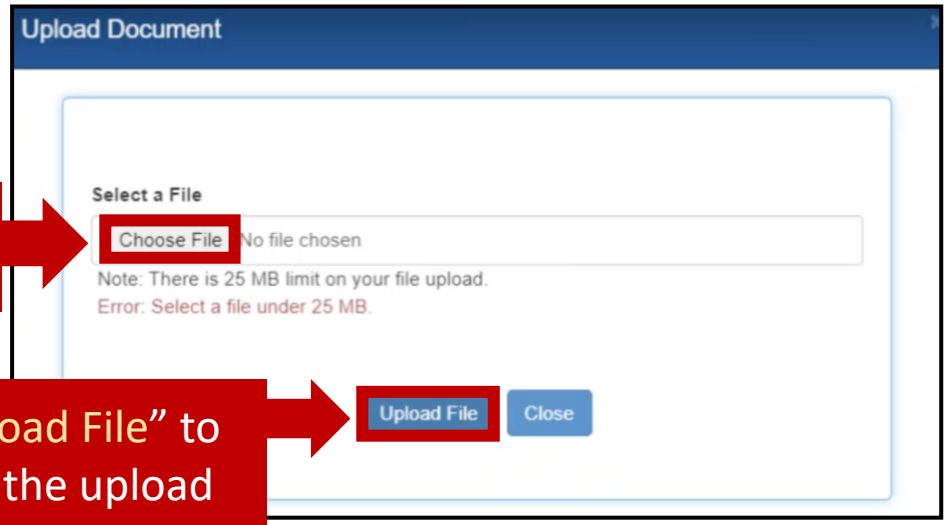
11 Once the window pops up, select "Choose File."

12 Click "Upload File" to complete the upload process.

An upload error may occur if a file is too large, or the file name exceeds 50 characters.

This example demonstrates the process of uploading supporting documentation for the QPP. An upload button for supporting documentation only becomes available after a Participant uploads a deliverable.





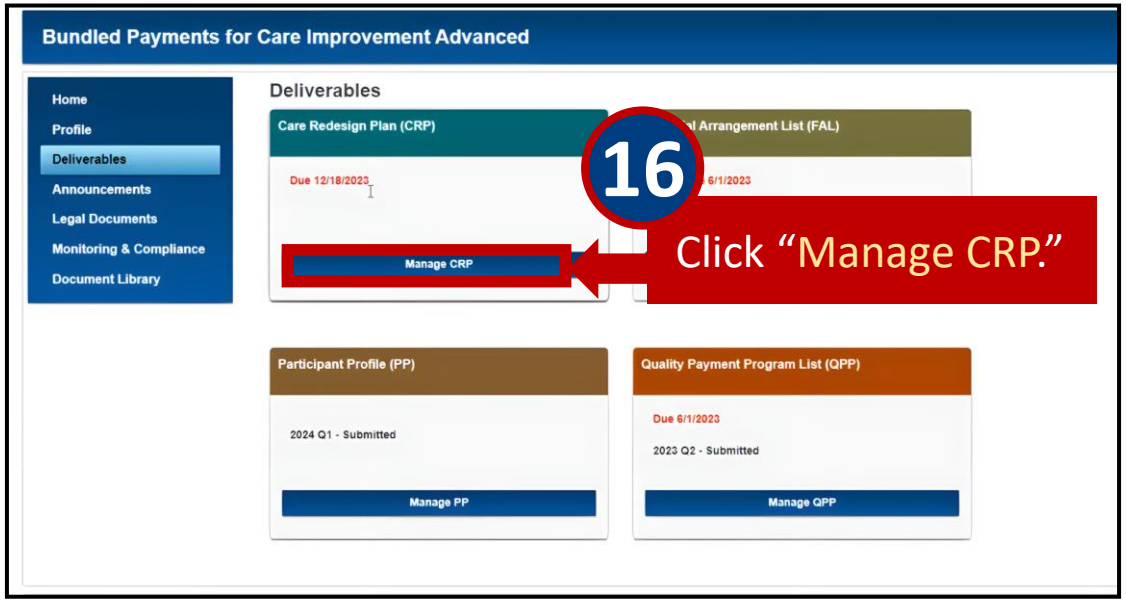
14 Once the window pops up, select "Choose File."

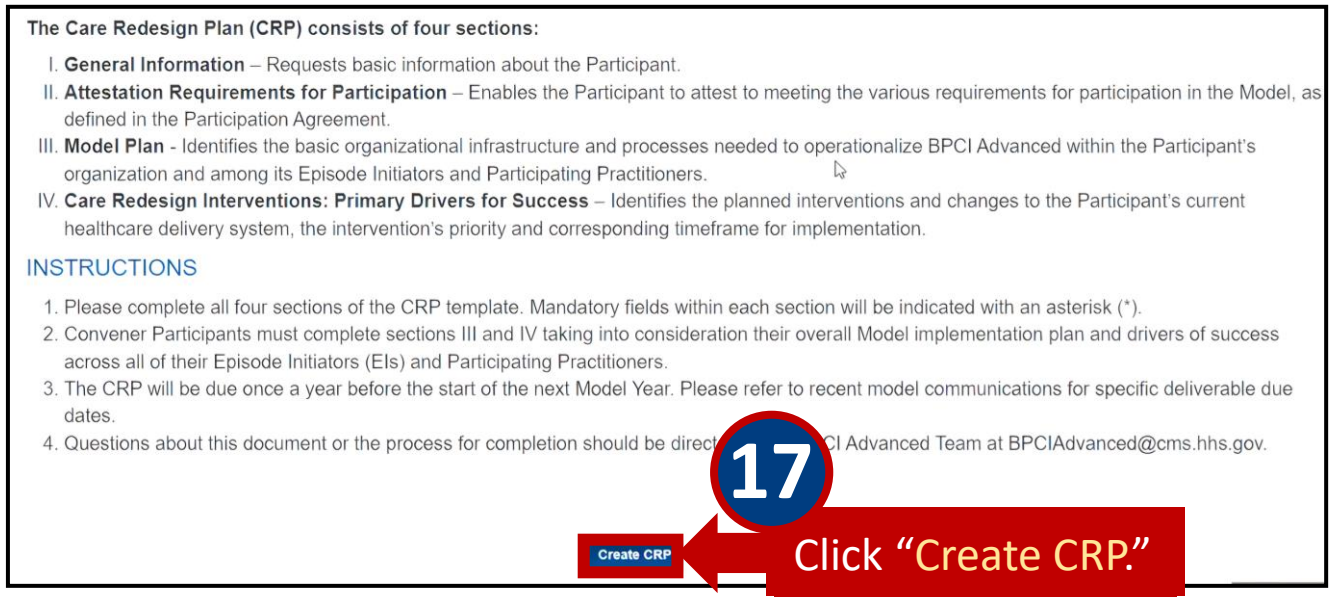
15 Click "Upload File" to complete the upload process.

An upload error may occur if a file is too large, or the file name exceeds 50 characters.

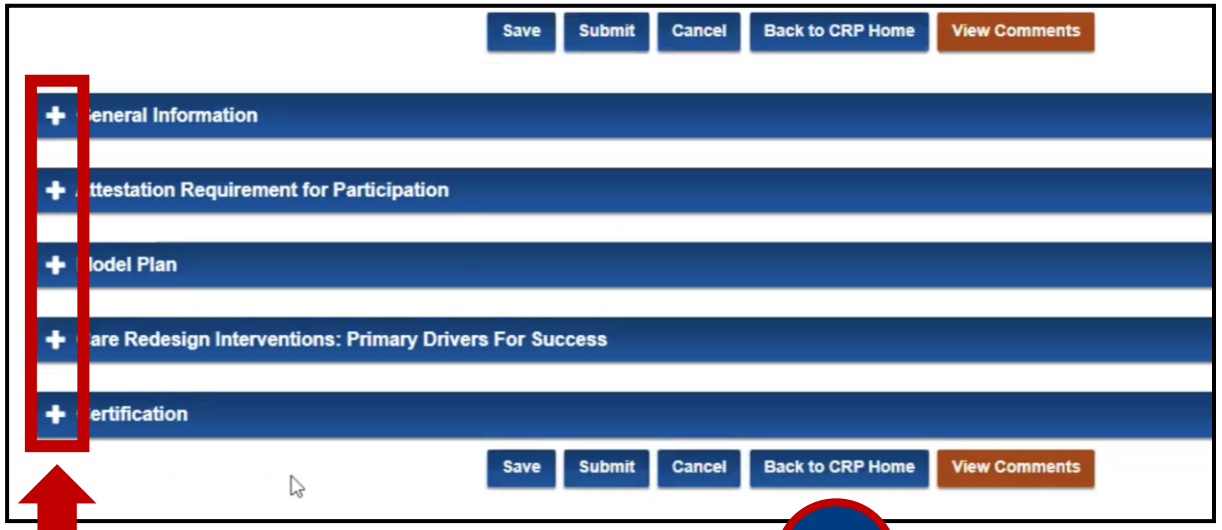
Deliverables – Care Redesign Plan

The Care Redesign Plan (CRP) is an electronic form that is only available during the open submission period prior to the start of the Model Year. Begin by clicking "Manage CRP," then follow the instructions for working on your CRP.





You will then be able to populate the sections of the CRP. Be sure to click “Save” following edits to ensure changes are captured in the Portal. Also, you will need to click “Submit” to finalize your responses and share the CRP with CMS.



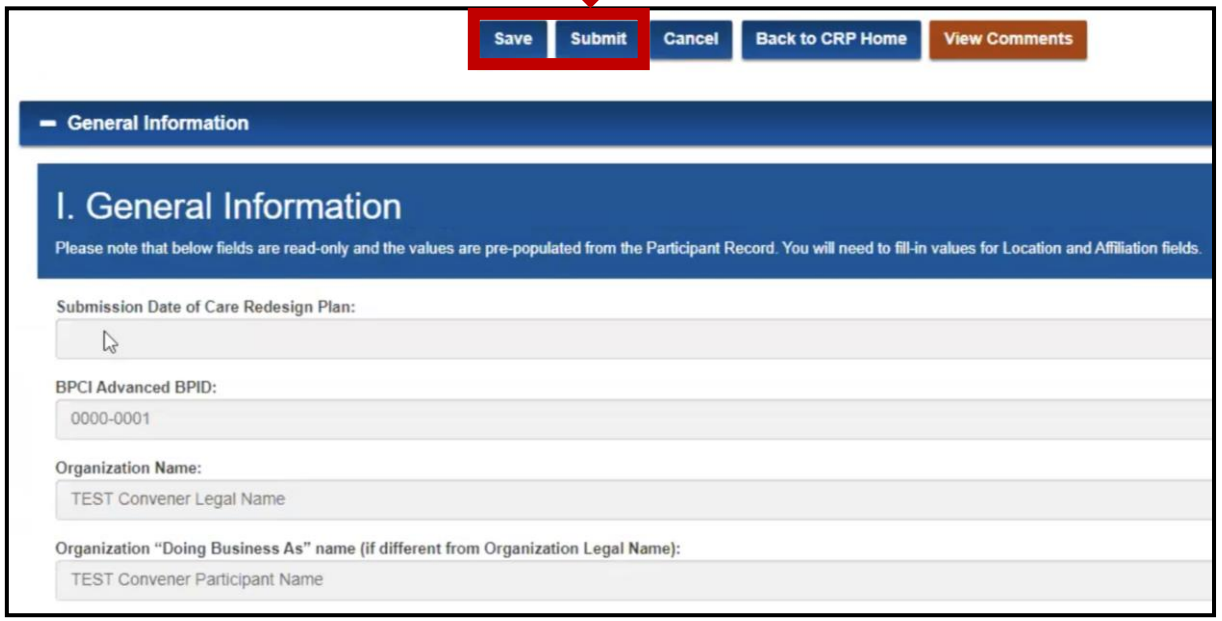
18

Expand a section for viewing and editing by clicking on the “+” symbol.

Fields that are grayed-out are read-only and not editable.

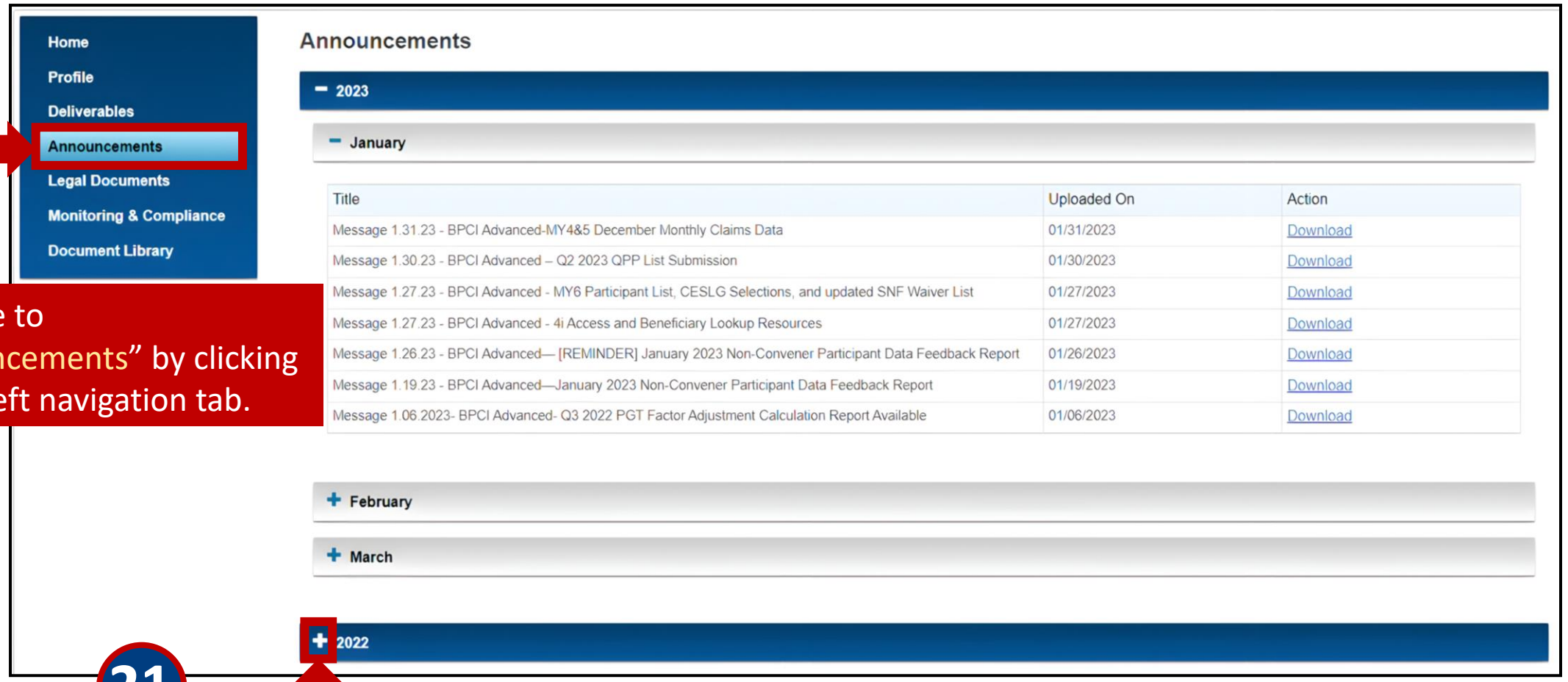
19

Click “Save” or “Submit.”



Announcements

The Announcements section displays emails sent by the Model Team. They are sorted in chronological order with the most recent date first.

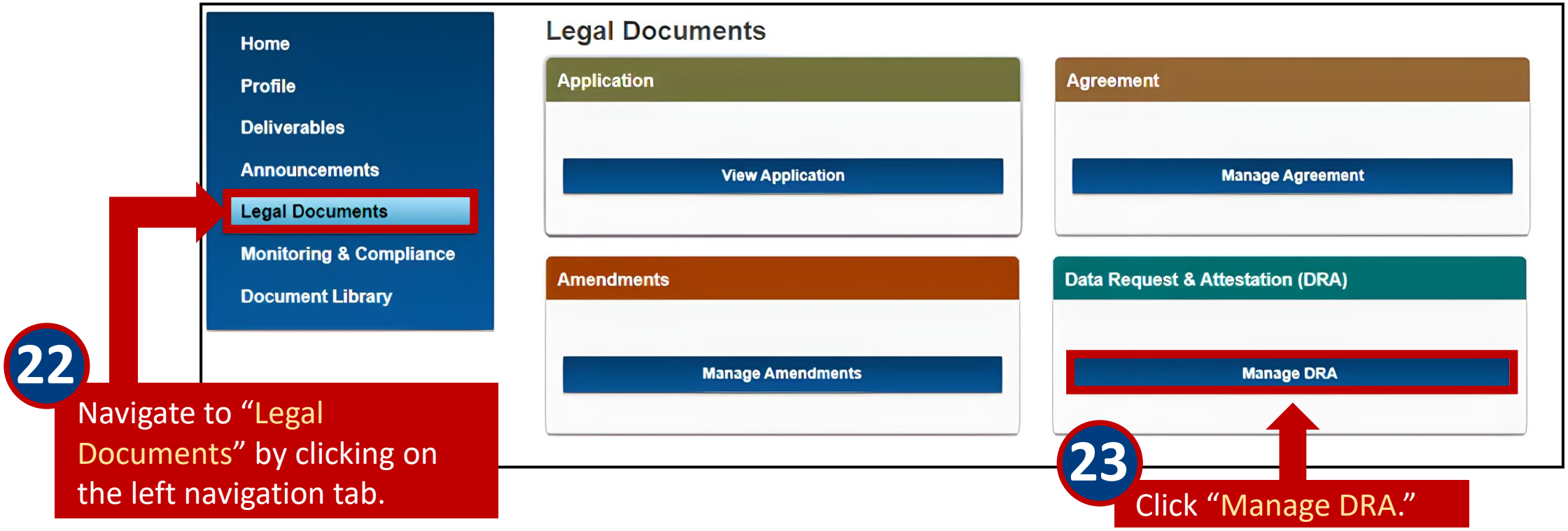


20 Navigate to "Announcements" by clicking on the left navigation tab.

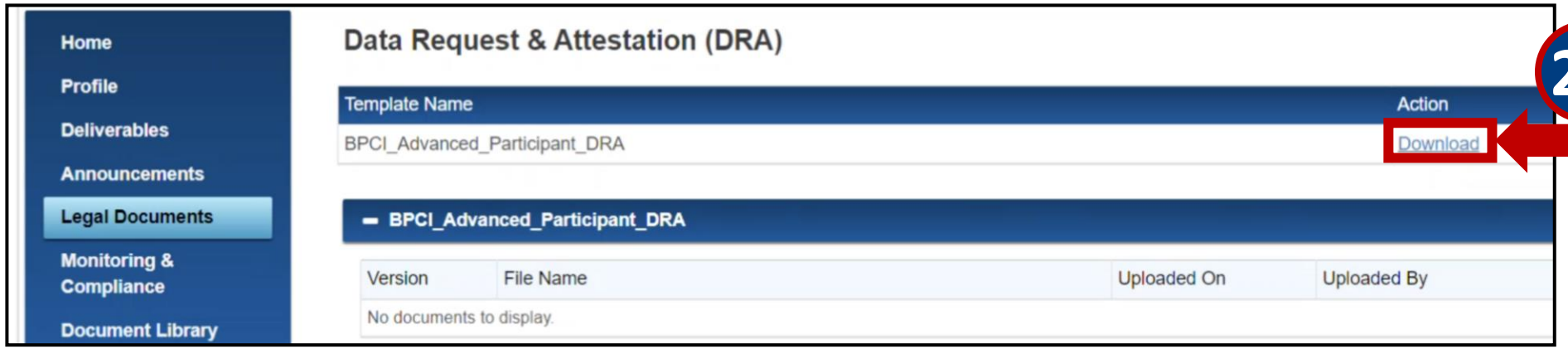
21 Expand each section by clicking the "+" symbol.

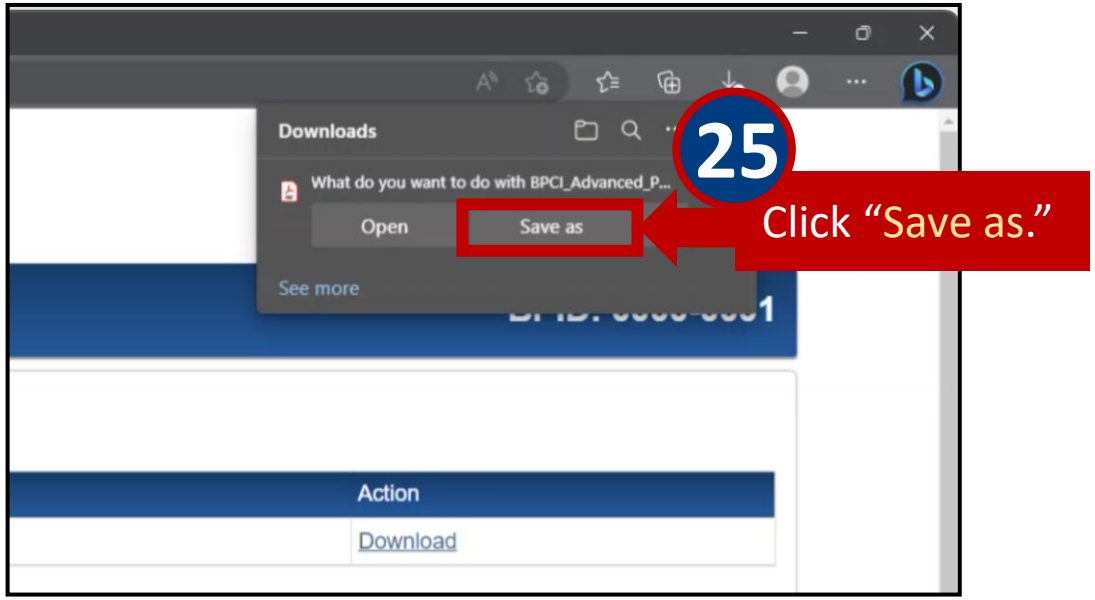
Legal Documents

The Legal Documents section allows Participants to view and manage the submission of required legal documents, such as: Application, Participation Agreements, Amendments (when needed), and the Data Request & Attestation (DRA) form. **This example demonstrates how to upload and download a DRA form.** The upload and download process for Participation Agreements and Amendments follows the same steps.



This example demonstrates how to download the current DRA template.



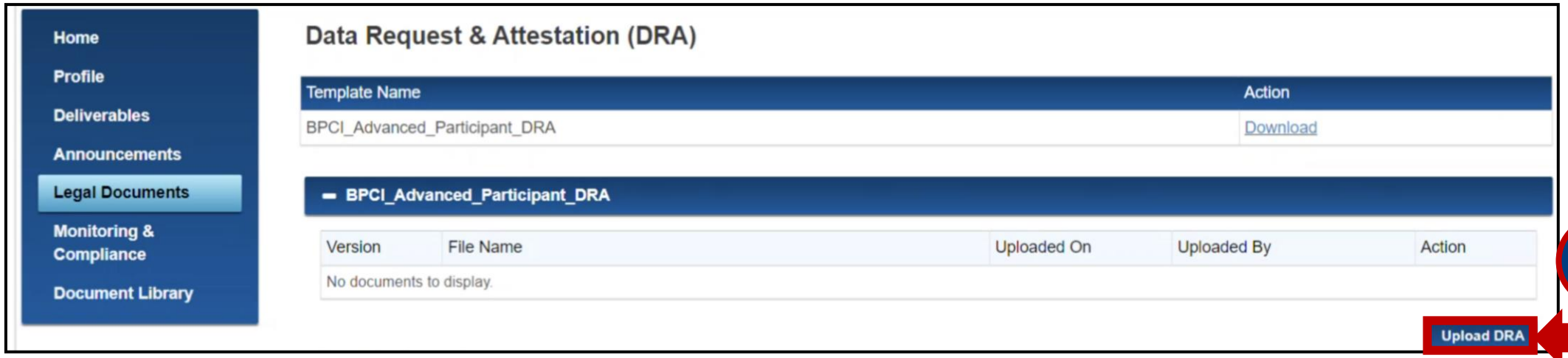


An anti-virus scan will be completed prior to downloading documents from the portal.

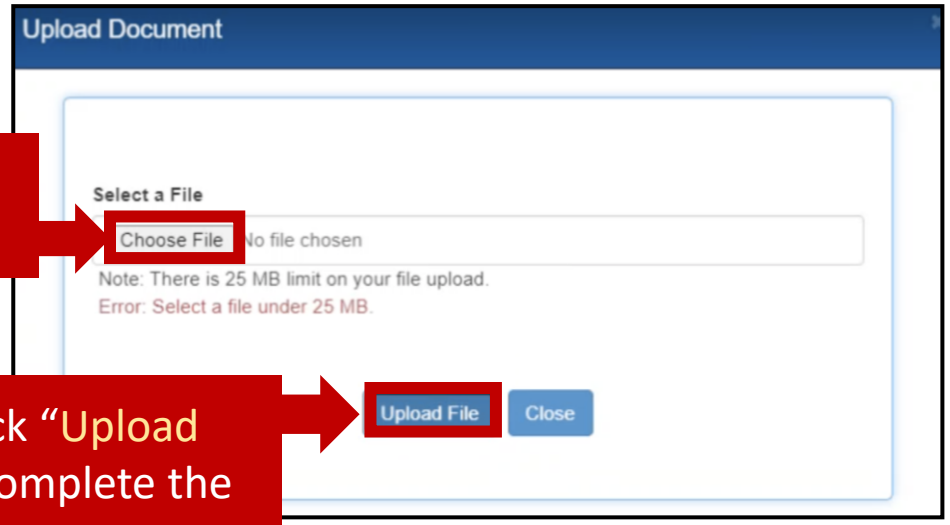
All Applicants submitted an "Applicant DRA" as part of their application. All NEW Participants in MY7 will have to submit a "Participant DRA" in the fall.

Legal Documents (cont. 2)

This example demonstrates how to upload the DRA. Users can also upload supporting documentation to legal documents, if applicable.



26 Click "Upload DRA."



27 Once the window pops up, click "Choose File."

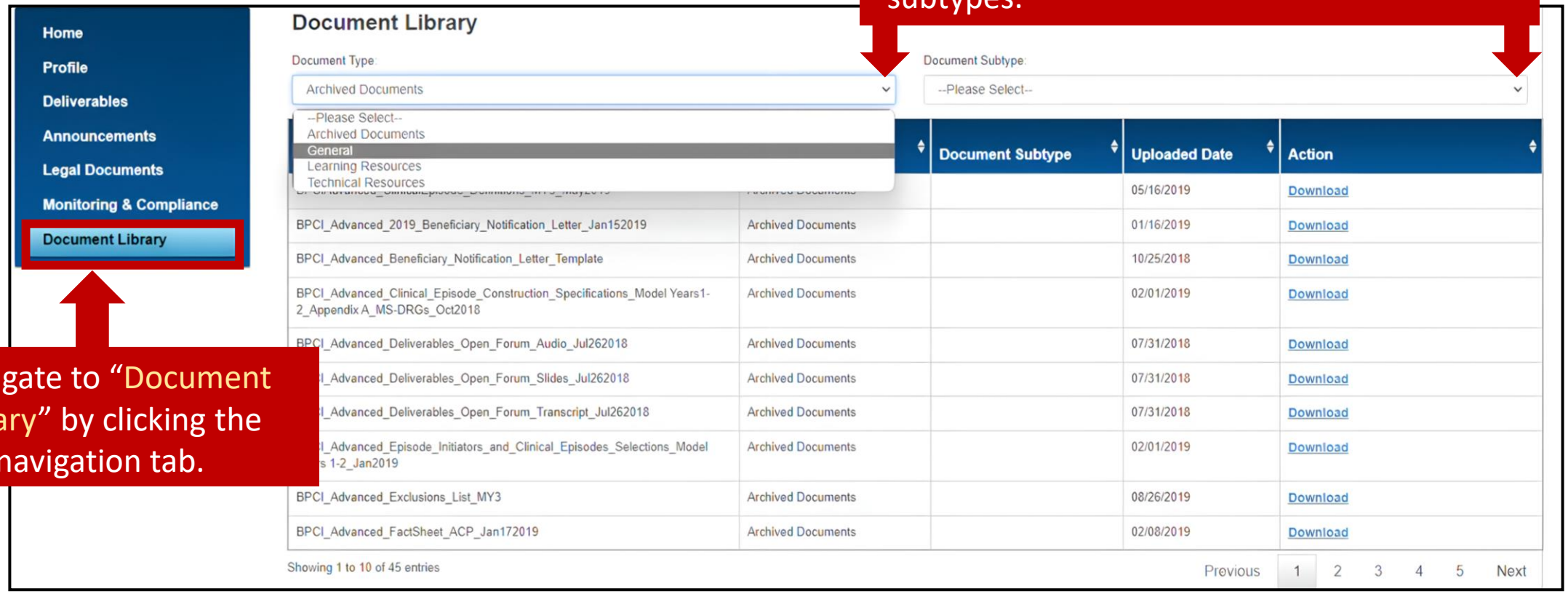
28 Then, click "Upload File" to complete the upload process.

An upload error may occur if a file is too large, or the file name exceeds 50 characters.

Document Library

The Document Library section is the historical depository for all Model-related documents: it includes templates, learning resources, technical resources and operational/policy materials. The files can be filtered using the two drop-down menus.

29 Click the drop-down arrow to select between different document types and subtypes.



30 Navigate to "Document Library" by clicking the left navigation tab.

Need Help?

- If you have trouble with the Registration process, contact the Salesforce Help Desk at: CMMIForceSupport@cms.hhs.gov or call 1-888-734-6433, option 5.
- If the IDM Identification process fails, contact **Experian** (1-866-578-5409).
- If you have questions about the Participant Portal or BPCI Advanced, contact the Model Help Desk at **BPCIAdvanced@cms.hhs.gov**.
- For information about the Model, Clinical Episodes, Pricing Methodology, Quality Measures and Evaluation Reports, visit the **BPCI Advanced Model General webpage**: **https://innovation.cms.gov/innovation-models/bpci-advanced**.

Appendix

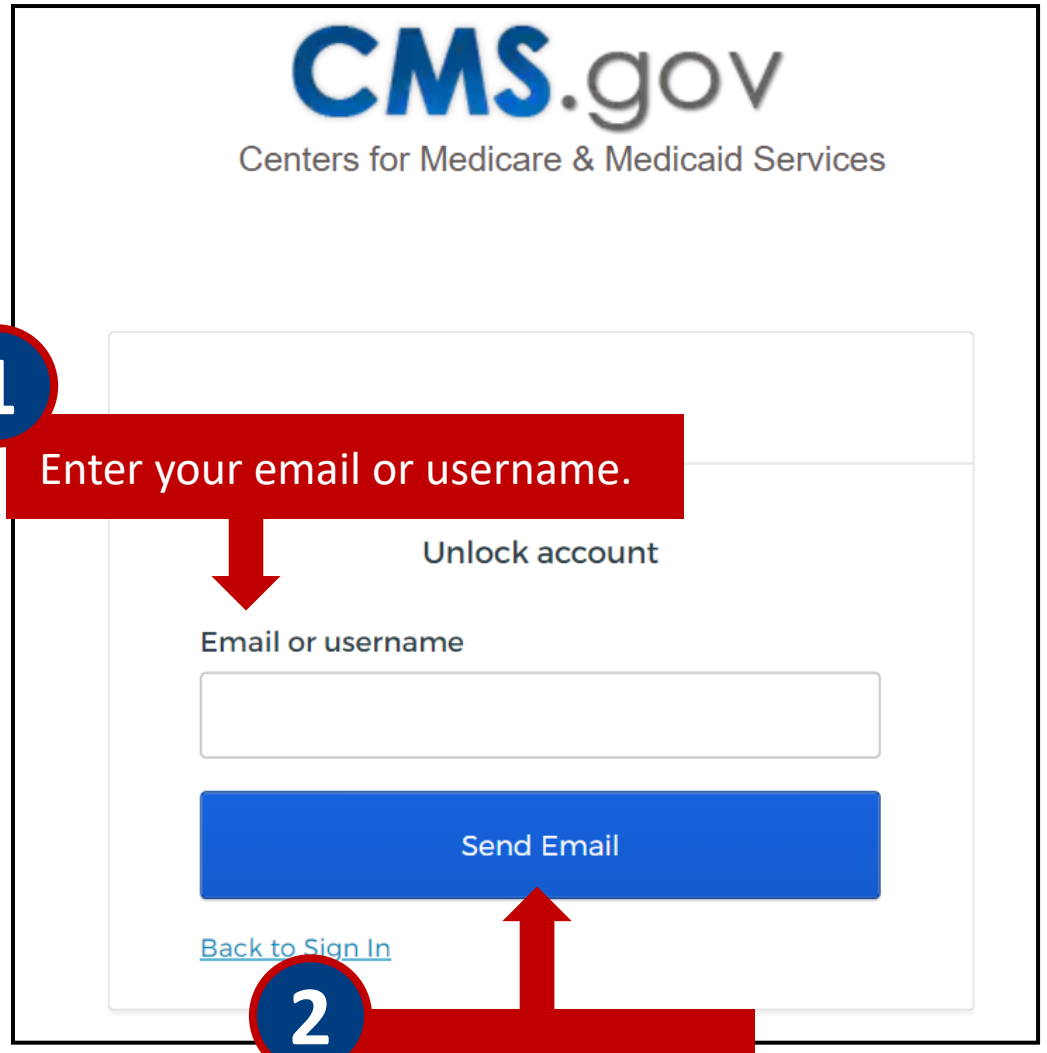
- *Overview of BPCI Advanced Portals*
- *Unlocking Your Account*
- *Resetting Your Account*

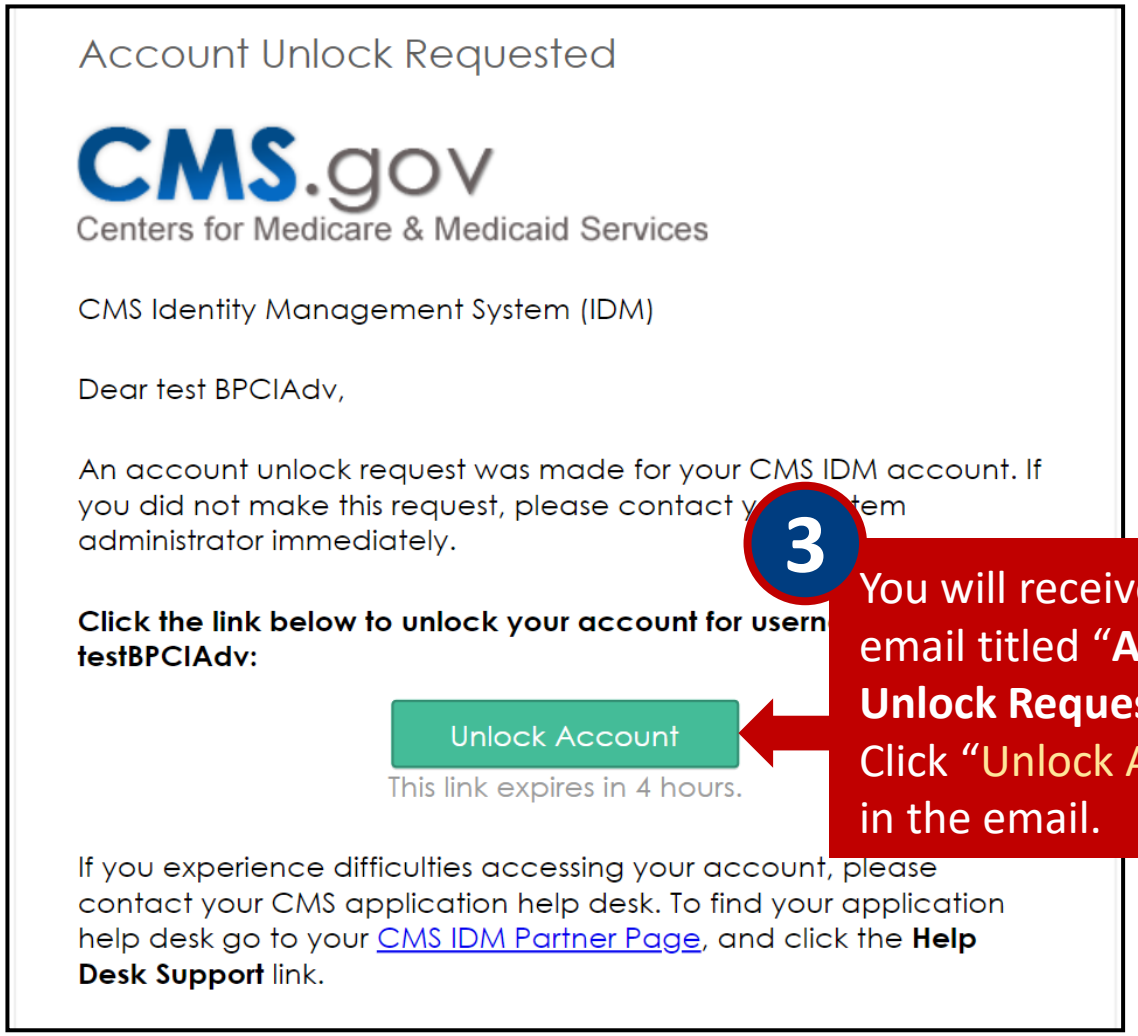
Overview of Portals that BPCI Advanced Participants Must Navigate

Portals	Portal Use
BPCI Advanced Participant Portal	• Online platform used by BPCI Advanced Participants to: ○ Access organizational data ○ Add/Delete Participant POCs ○ Download templates and submission of deliverables ○ Access Participation Agreement, Amendments and DRA ○ Verify Clinical Episode selection ○ Document Library: Model communications and reference materials
CMS Enterprise/Data Portal	• Online platform used by CMS to deliver: ○ Preliminary and updated Target Prices ○ Baseline claims data ○ Monthly claims data ○ Reconciliation Reports ○ Quality Measure data • Please note, the Data Portal is hosted within the CMS Enterprise Portal and IC-Innovation Center Application (see graphic below)

Unlocking Your Account

If you enter the wrong password three times, your account will be locked.



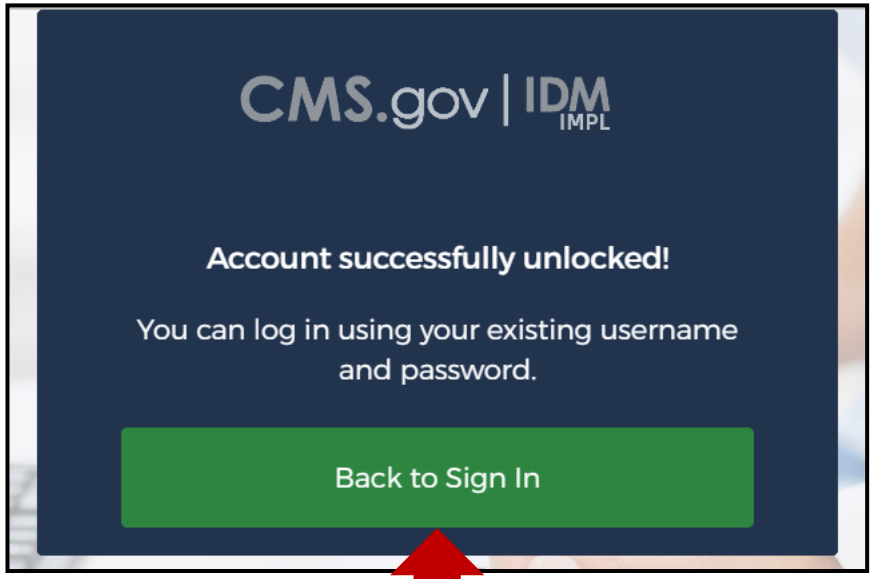


Unlocking Your Account (cont.)

You will receive confirmation that your account has been successfully unlocked.

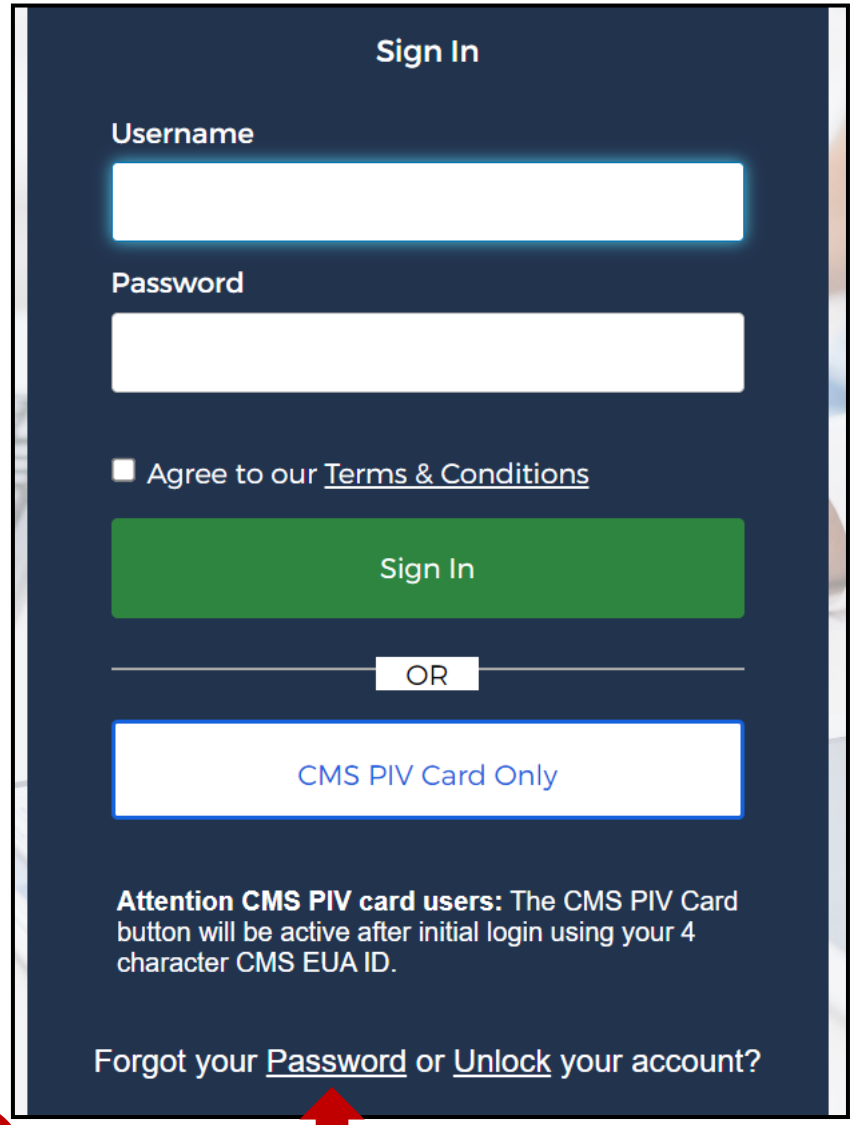
4 Answer the security question with the answer you provided during registration.

5 Click "Unlock Account."



6 Click "Back to Sign In."

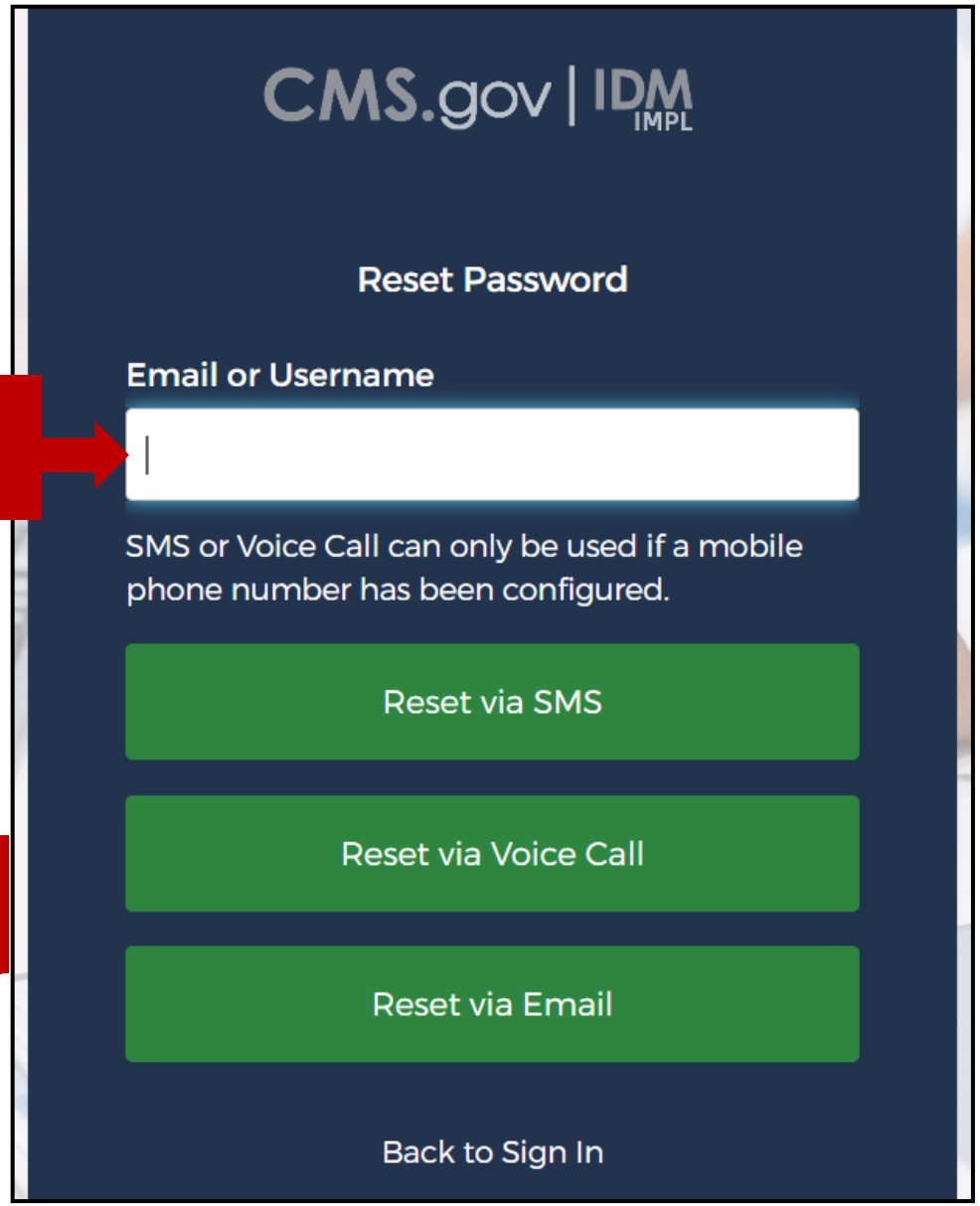
Resetting Your Password



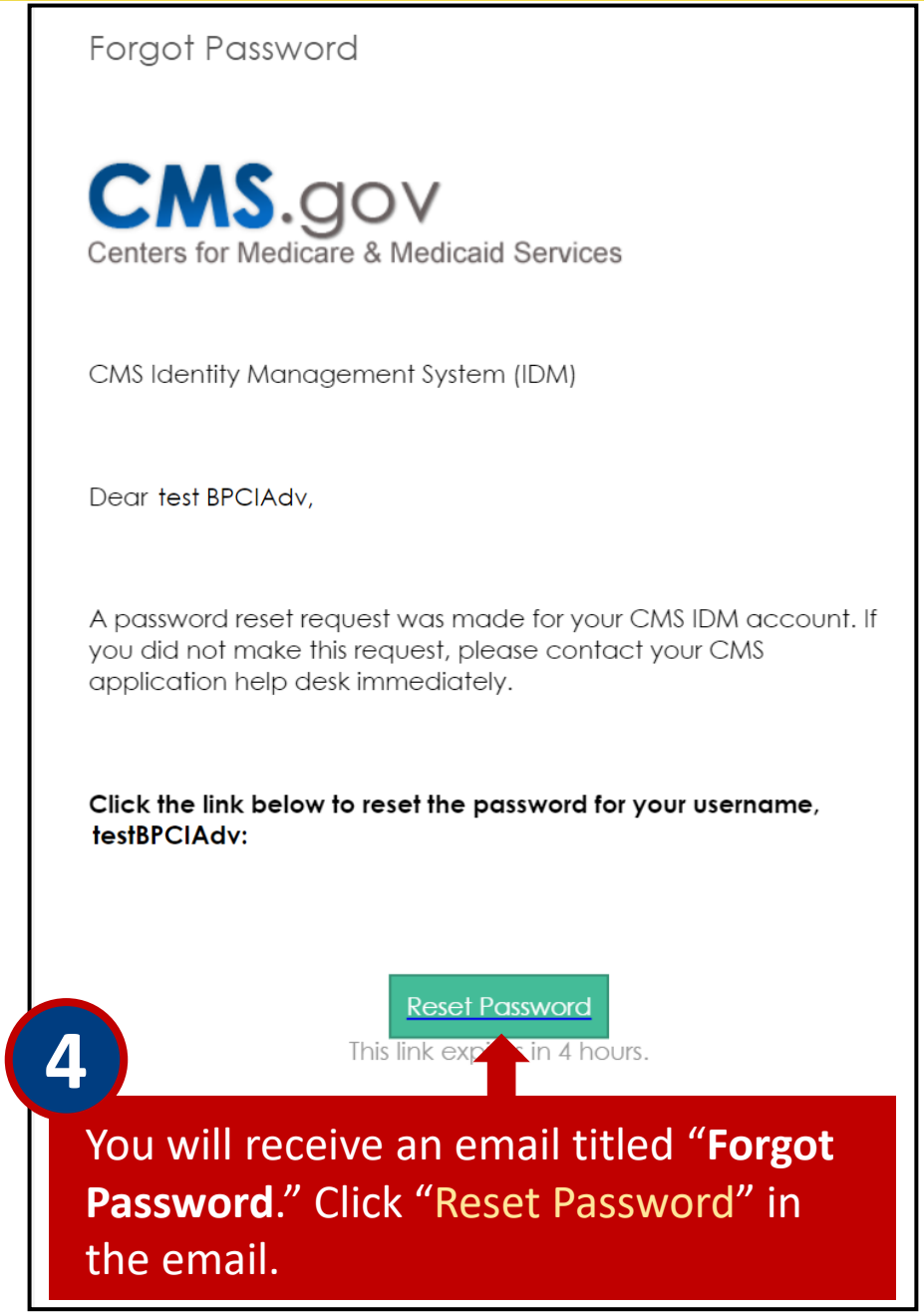
1 Click "Password" to reset your password.

2 Enter your email or username.

3 Click one of the reset options.



Resetting Your Password (cont. 1)

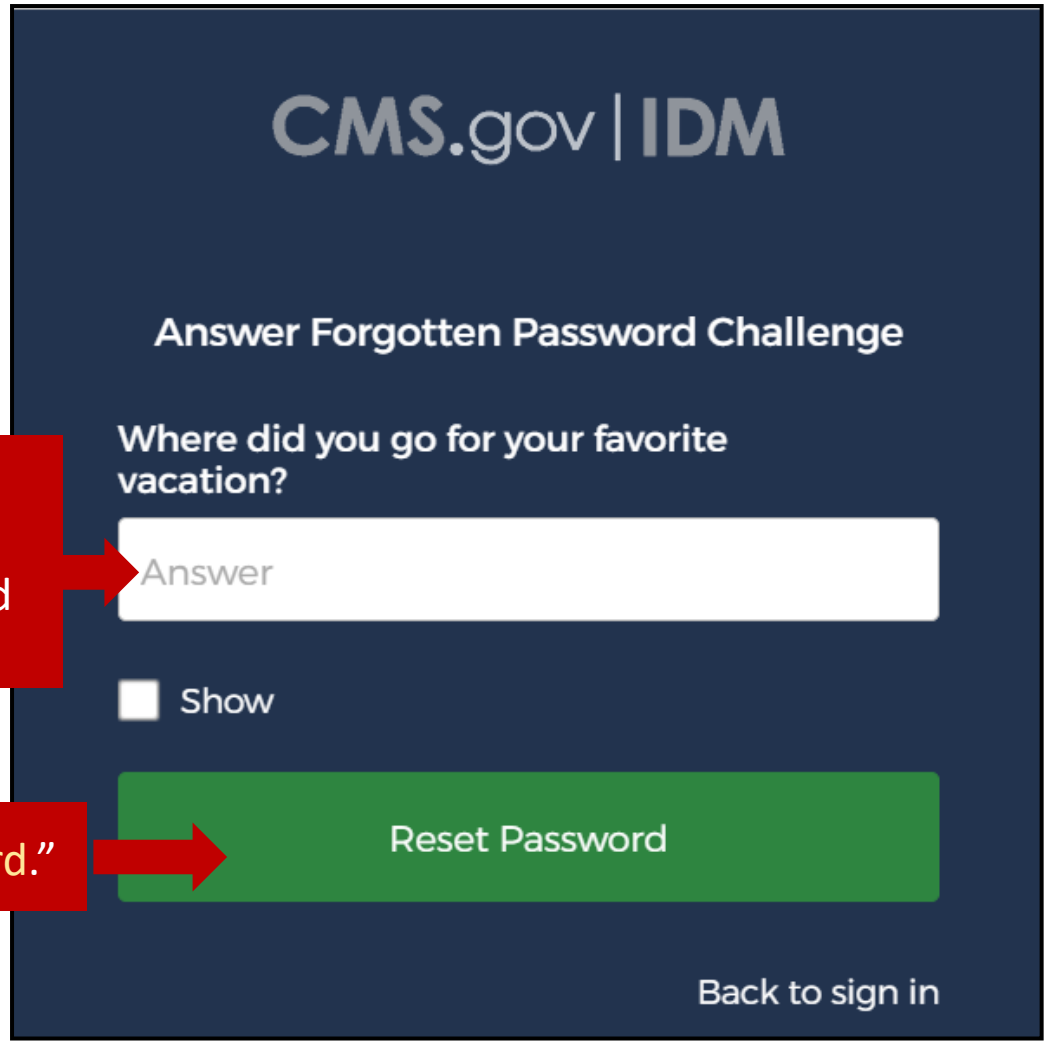


4 You will receive an email titled "**Forgot Password**." Click "Reset Password" in the email.

The reset password link expires four hours after it is sent. If the link expires, you will have to repeat this process to get a new link.

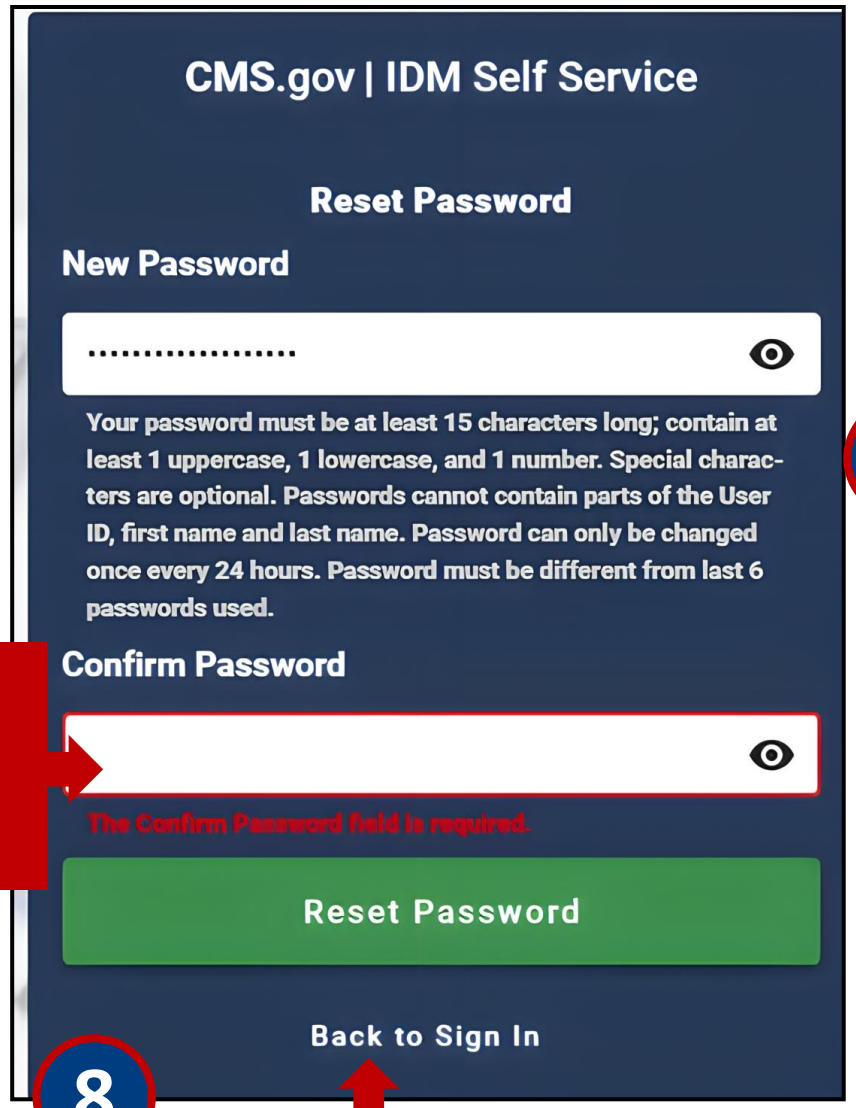
5 Answer the security question with the answer you provided during registration.

6 Click "Reset Password."



Resetting Your Password (cont. 2)

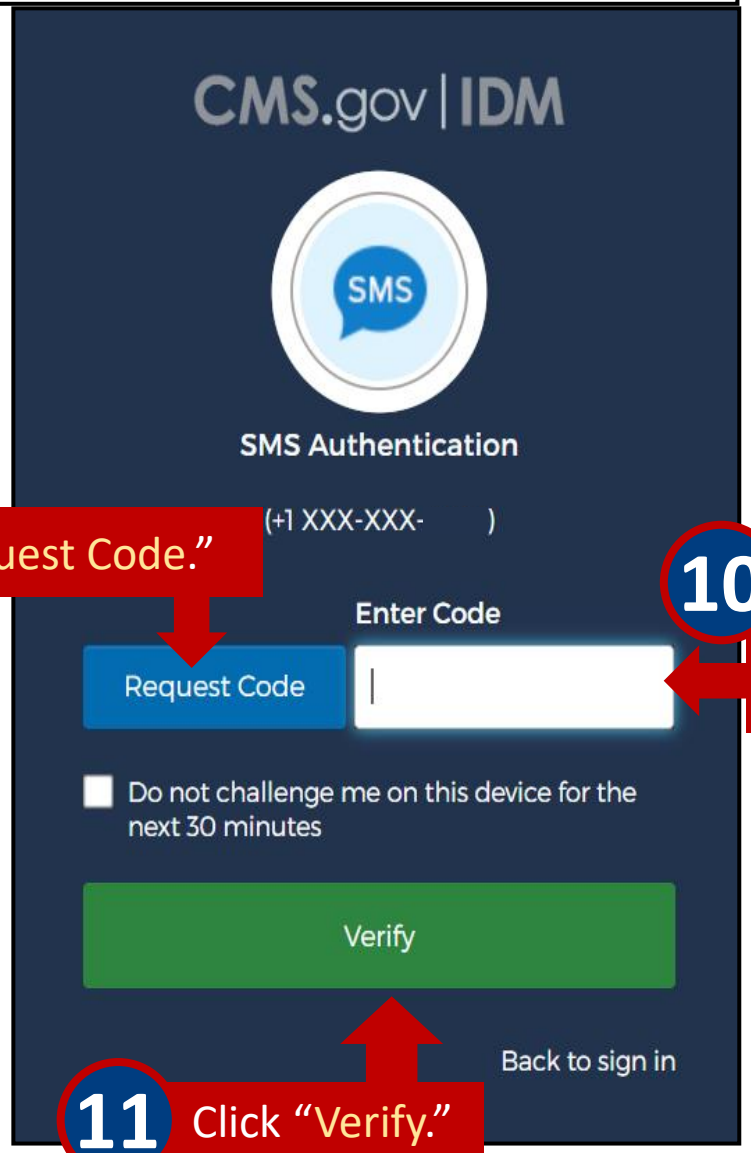
Enter the code promptly. **The IDM session will time out after five minutes of inactivity.**



7 Enter and confirm a new password.

8 Click "Reset Password."

9 Click "Request Code."

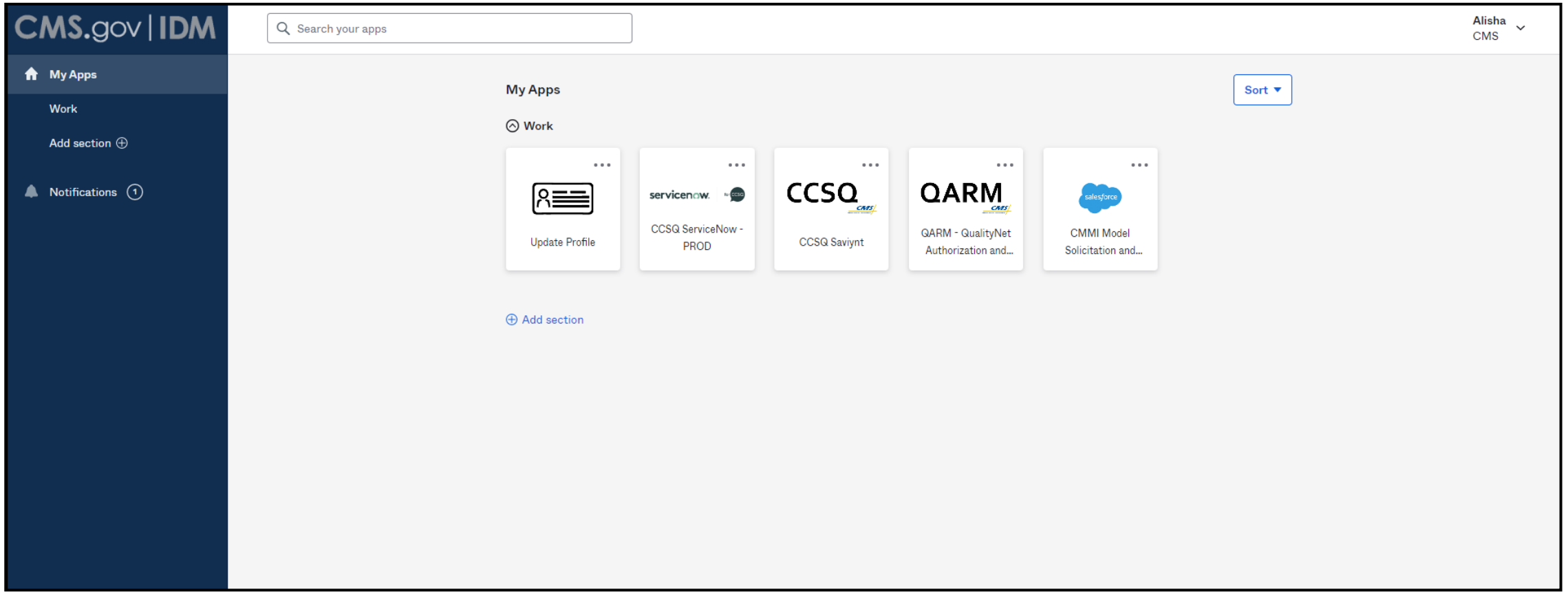


10 Enter the code you received.

11 Click "Verify."

Resetting Your Password (cont. 3)

You will then be directed to the CMS IDM homepage.



For instructions on how to navigate the Participant Portal, ***click here*** to navigate to Section 4 – Navigating the Participant Portal.