PCF

Primary Care First

PRIMARY CARE FIRST: PRACTICE MANAGEMENT GUIDE

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Primary Care First Practice Management Guide

Introduction

This document outlines the policies and guidelines for practice management change requests for the Primary Care First Model Options in Program Year 2021. Practice management changes refer to specific changes in the makeup of the practice, including updates to practitioners and practice contacts, in addition to more complex practice changes, such as mergers or acquisitions.

Practice Management Policy, Section 1 of this guide, highlights general policies related to practice management data. Step-by-step instructions for the Primary Care First Practice Portal are included in Section 2, Practice Management: PCF Practice Portal How-To.

For any questions regarding practice management policy or processes, please contact Primary Care First Support via 888-517-7753 or PCF@telligen.com.

1. Practice Management Policy

During Primary Care First, practitioners and staff in your practice may change, and your practice may change ownership, location, or billing information. As part of the Participation Agreement, each practice agrees to keep its practice information, including practitioner and staff rosters, reflective of the practice's current state. Current and accurate information facilitates timely and correct Primary Care First payments, assists the Centers for Medicare & Medicaid Services (CMS) in monitoring your practice's performance, and ensures your practice receives accurate and timely program information.

1.1 Practice Demographic

Please review your practice demographic information frequently to ensure the most accurate data are reflected to ensure accurate attribution and payment. You should submit any updates promptly via the Primary Care First Practice Portal, or you may contact Primary Care First Support for assistance (888-517-7753 or PCF@telligen.com).

1. Demographic Information
    a. Practice Name
        i. Reflects what the practice is known as in the community. A practice is defined as the legal entity that employs the participating primary care practitioner(s) providing care at a single "brick-and-mortar" physical location.
        ii. Refers to your practice's "Doing Business As" (DBA) name.
        iii. Reference Portal How-To Section 2.2.1 for updating your practice name.
    b. Practice Legal Name
        i. Refers to the entity whose Medicare billing Tax Identification Number (TIN) is used to bill primary care services provided at the practice site on

behalf of one or more physicians, non-physician practitioners, or a combination thereof.

   ii. Reference Portal How-To Section 2.2.1 for updating your practice legal name.

c. Practice Address
   i. The “brick-and-mortar” physical location, which should reflect the practice’s physical address.
   ii. Reference Portal How-To Section 2.1.1 for updating your practice address.

2. Practice Contacts: CMS uses the contacts listed in the Primary Care First Practice Portal to provide important program information. Primary Care First Practices should frequently review and update the information provided in their “**My Practice Info**” tab of the Primary Care First Practice Portal to ensure accuracy. CMS includes quarterly articles in *First Edition* (the Primary Care First newsletter), reminding practices to review and update Primary Care First Practice Portal information. Below are guidelines for Primary Care First Practice Contacts:

   a. Primary Contact (required): This individual must be located at the practice or organization with clear Primary Care First oversight responsibilities and authority, ensuring a direct link to the practice and timely receipt of all necessary Primary Care First communications. Consultants operating on behalf of the practice do not meet this requirement.

   b. Secondary Contact (optional): A consultant may be listed as a secondary contact. All consultants working with the Primary Care First model on behalf of your practice must be listed on the staff roster.

   c. Practice Executive Lead Contact (required): This individual is the Clinician Lead located at the practice. Consultants operating on behalf of the practice do not meet this requirement. This should be the same individual who signed the clinical letter of support for the practice. Advanced Primary Care functions are an essential component of the Primary Care First model; therefore, it is imperative that the Practice Executive Lead located at the practice directly oversees all aspects of the practice’s processes. This individual should be working at the practice site and should be listed on the practitioner roster in the Primary Care First Practice Portal. If the Clinician Lead is listed on the practitioner roster for a different Primary Care First Practice, that lead should be listed on the staff roster.

   d. Health Information Technology (IT) Contact (required): The Health IT Contact is the practice’s representative for health IT–related questions or issues. This individual must be familiar with the Primary Care First health IT requirements and work closely with the practice’s health IT vendors, including qualified registries or qualified clinical data registries. CMS or its operations team will communicate with the Health IT Contact if any related issues arise. If the practice uses a consultant to manage its relationships with health IT vendors, the practice can list a consultant as the Health IT Contact.

   e. Reference Portal How-To Section 2.1.2 for updating your practice contacts.

1.2 Practice Information

Please review your practice information frequently to make sure the most accurate data are reflected. This will help ensure correct beneficiary attribution and payment. You should submit any updates promptly via the Primary Care First Practice Portal, or you may contact Primary Care First Support for assistance (888-517-7753 or PCF@telligen.com).

1. Organizational Information: This section includes practice ownership information. If your practice's ownership changes, because of the complexity of required steps and important changes that need to occur to ensure continued program participation, please notify Primary Care First Support.
    a. If your practice is owned by another healthcare organization (e.g., a group practice, hospital, or health system), you are required to maintain accurate and up-to-date information (e.g., organization name, demographic information, and contact information) in the Primary Care First Practice Portal.
    b. Reference Portal How-To Section 2.2.2 for updating practice ownership information.
2. Organizational National Provider Identifier (NPI)
    a. NPI is a unique 10-digit identification number issued to healthcare practices in the United States by CMS.
    b. The NPI listed should be tied to the practice's Medicare Part B enrollment.
    c. Reference Portal How-To Section 2.2.3(a) for updating your practice's Organizational NPI.
3. Provider Transaction Access Number (PTAN)
    a. A PTAN is a Medicare-only number issued to providers by Medicare Administrative Contractors upon enrollment to Medicare. When a Medicare Administrative Contractor approves enrollment and issues an approval letter, the letter will contain the PTAN assigned to the practice.
    b. The PTAN listed should be tied to the practice's Medicare Part B enrollment.
    c. Reference Portal How-To Section 2.2.3(a) for updating your practice's PTAN.

1.3 Practice Composition

Please review your practice information frequently to make sure the most accurate data are reflected. This will help ensure correct beneficiary attribution and payment. You should submit any updates promptly via the Primary Care First Practice Portal, or you may contact Primary Care First Support for assistance (888-517-7753 or PCF@telligen.com).

1. Practitioners: All practitioners providing primary care services at the practice site and under the practice's TIN shall be included on the Primary Care First practitioner roster (located on the Primary Care First Practice Portal) as participating Primary Care First practitioners in accordance with Section 3.03 of the PCF Component Participation Agreement.

a. Your practice may add or withdraw practitioners at any time during participation in Primary Care First. CMS uses only those practitioners listed on your practice's practitioner roster to determine beneficiary attribution and payments.

b. For CMS to consider practitioners part of your Primary Care First practitioner roster, the practitioners must meet the following criteria:

   i. Be a physician (MD or DO), nurse practitioner (NP), physician assistant (PA), or clinical nurse specialist (CNS).

      1. CMS does not require that your practitioner roster include a physician (MD or DO) for your practice to remain in Primary Care First. Your practitioner roster may contain solely non-physician practitioner types, such as NPs and PAs.

      2. CMS encourages, but does not require, the addition of residents to the practitioner roster. When a resident is listed and billing under a supervising physician, the supervising physician must be listed and practicing on the same practitioner roster.

      3. No minimum number or percentage of hours is required for a practitioner to be included on your practitioner roster.

   ii. Have a specialty of internal/adult medicine, general medicine, geriatric medicine, family medicine, or hospice and palliative medicine (applicable to physicians only).

   iii. Pass a CMS-initiated Center for Program Integrity screening to ensure that each practitioner is eligible to bill Medicare.

   iv. Reference Portal How-To Section 2.3.1 for updating practitioner information.

c. Practitioners at Multiple Locations

   i. CMS performs attribution calculations using the individual NPI and practice TIN combination. If a practitioner practices at multiple practice locations that share a single TIN, the practitioner can be listed on only one practitioner roster. Practitioners should be listed on the roster of the practice where they spend the majority of their time.

      1. A Comprehensive Primary Care Plus (CPC+) practitioner can be listed on a Primary Care First practitioner roster if the practices do not share a TIN.
      2. An NPI cannot be listed on multiple rosters (Primary Care First or CPC+) if the practices share a TIN.
      3. If the practitioner moves from one Primary Care First Practice to another, the practice must submit practitioner add/withdraw requests for each site. CMS will not add a practitioner to a different Primary Care First Practice before processing a withdrawal of the practitioner from the initial Primary Care First or CPC+ practice.

   ii. At any given time, practitioners can be active at only one Primary Care First or CPC+ practice site with the same TIN. If your practice has a practitioner who works part time at your practice but also provides primary care services at a different practice site with the same TIN (either Primary Care First or non-Primary Care First), please note the following:

1. Attribution: If the practitioner's primary and secondary locations share the same TIN, claims history from both the practitioner's primary and secondary location (either Primary Care First or non–Primary Care First) will be included in your practice's attribution and will affect payment.
2. Quality Reporting: Any practitioner listed on the Primary Care First practitioner roster must be included in the practice's quality reporting for that specific practice site location. If the practitioner's primary and secondary locations share the same TIN, claims history from both the practitioner's primary and secondary location (either Primary Care First or non–Primary Care First) will be included in your practice's claims-based quality measures.

d. Center for Program Integrity

i. To maintain the integrity of Primary Care First, CMS will retroactively review practitioners and practices participating in the model to ensure they meet the following criteria:

1. The practitioner (individual NPI) is currently enrolled in and eligible to bill Medicare for services.
    a. Residents, PAs, NPs, and CNSs who bill under a supervising physician are an exception and do not need to be individually eligible to bill Medicare. These individuals should be listed in the practitioner roster. Residents who have completed their initial residency and are continuing their education for a specialty are not considered residents.
2. The practitioner does not have any current CMS sanctions.
3. The practice's TIN, Organizational NPI, and PTAN are currently enrolled in and able to bill Medicare for services.
4. The practice's TIN, Organizational NPI, and PTAN (optional) are not associated with a Rural Health Clinic or Federally Qualified Health Center.

e. Legal Issues

i. CMS will review practitioners' answers regarding historical legal issues on an individual, case-by-case basis.

ii. CMS will allow practitioners with pending investigations to join Primary Care First, recognizing that board actions regarding practitioner limitations are acceptable if the action does not affect the practitioner's eligibility to bill Medicare.

f. Locum Tenens Policy

i. CMS will not add locum tenens practitioners providing temporary coverage (i.e., less than 3 months) for other practitioners in the practice.

g. Concierge Fees

i. Primary Care First does not allow charging of concierge fees for any Medicare fee-for-service beneficiaries. Practices that offer concierge services must notify Primary Care First Support, as noted in the Participation Agreement, Section 9.3(b).

ii. Practices must remove practitioners charging concierge fees from the Primary Care First practitioner roster or use a separate TIN that is not included in the Primary Care First Practice information and attribution calculations.
iii. Practices must keep concierge funds separate from the Primary Care First funds. Practices that charge concierge fees for other non-Medicare patients and meet all Primary Care First requirements for eligibility will be allowed to continue participation in Primary Care First.
iv. Practices that offer concierge services should be prepared to provide documentation that confirms none of their Medicare fee-for-service beneficiaries are being charged concierge fees.

h. Practitioner Designation Change
   i. All practitioners within Hybrid practices should be noted as supporting the PCF, Seriously Ill Population (SIP), or Hybrid component. Practices can specify a new practitioner's designation upon new practitioner add requests or edit an existing practitioner's designation within the Primary Care First Practice Portal.
   ii. Reference Portal How-To Section 2.3.1(c) to update your practitioner's designation.

2. Data Custodian

   a. To ensure proper handling of Primary Care First Practice data, practices are required to provide a Data Custodian 1 and Data Requestor. Practices also may provide a Data Custodian 2. These contacts are populated and maintained within the Primary Care First Practice Portal.

   b. Contact changes for Data Custodian/Data Requestor should be completed via the Primary Care First Practice Portal.

      i. Data Custodian 1 (required): This contact must work at the practice or organization and serves as custodian of the CMS data files on behalf of the Primary Care First Practice. To prevent unauthorized use or disclosure, the Data Custodian will be responsible for the observance of all conditions of use and disclosure of practice data and any derivative data files, as well as for the establishment and maintenance of security arrangements as specified in the Participation Agreement. In addition, the Data Custodian will be responsible for contractually binding any downstream recipients of such data to the terms and conditions in the Participation Agreement as a condition of receiving such data.
      ii. Data Custodian 2 (optional): This contact may be an additional practice or organization contact or a Health Insurance Portability and Accountability Act (HIPAA)-covered business associate who serves as custodian of the CMS data files on behalf of the Primary Care First Practice. The responsibilities of a Data Custodian 2 are identical to those of a Data Custodian 1.
      iii. Data Requestor (required): The Data Requestor attests that the individual(s) designated as custodians of the data are authorized to act as points of contact (POCs) on behalf of the Primary Care First Practice for the purposes of data disclosures under Primary Care First.
      iv. The Data Custodian 1 and Data Requestor may be the same contact.

   v. Reference Portal How-To Section 2.3.2 to update your practice's Data Custodian(s)/Data Requestor.

3. Staff Roster
   a. The staff roster must include at least one staff member who is physically located at the practice site, such as any of the following:
      i. Practice staff working at the physical site location directly involved with Primary Care First.
      ii. Administrative staff supporting the practice involved with Primary Care First.
      iii. Non-practicing practitioners, or specialty practitioners who are not part of the practitioner roster but support the practice with Primary Care First activities. For example, a practice may have a clinic director supporting Primary Care First who is also a medical doctor but does not see patients. In this case, the practitioner would be included in the staff roster, not the practitioner roster.
      iv. Consultants who work directly to support the practice with Primary Care First activities. Some practices may want to include a consultant on their staff roster. In these cases, the practice is considered a "sponsor" for that consultant. Sponsorship includes providing management and oversight surrounding the consultant's data access and use. The practice is responsible for ensuring staff, including consultants, on the staff roster are not selling or otherwise distributing data in a way that is not directly related to supporting the practice's Primary Care First activities.
   b. Staff members who work at multiple Primary Care First Practice Sites
      i. must be listed in the staff roster for each practice they support, and
      ii. require practices to populate the number of hours worked that reflects the total hours worked at the clinic, not just hours worked on Primary Care First activities.
   c. Reference Portal How-To Section 2.3.3 for updating your practice's staff roster.

4. Distribution List
   a. To be added to the distribution list to receive the Primary Care First Practice newsletter (*First Edition*) and to be eligible for Primary Care First Connect access, contacts must be listed in the Primary Care First Practice Portal as a main contact (Primary, Secondary, Practice Executive Lead Contact, or Health IT Contact), organizational contact, or Data Custodian, or be listed within the staff roster or practitioner roster.

5. TIN
   a. CMS recognizes that during your practice's participation in Primary Care First, business changes may occur, including changes to your practice TIN. If your practice anticipates changing its TIN, you must submit a TIN Change Request in the Primary Care First Practice Portal. You must submit a TIN Change Acknowledgment form to be signed by your signatory authority or an authorized individual to legally bind your organization with your Primary Care First Practice Portal request.
   b. Per the Primary Care First Participation Agreement, Section 3.01(a)(4), Primary Care First Practices shall only have one active billing TIN.

   c. Reference Portal How-To [Section 2.3.4] for updating your practice's TIN information.

6. Practice withdrawals: If the Primary Care First Practice returns the signed Intent to Withdraw form to CMS on or before February 28 of a Performance Year, the Primary Care First Practice may also specify an effective date of termination that is at least 30 days after the date of the notice.
   a. If the Primary Care First Practice sends the written notice of termination to CMS after February 28 of a Performance Year, the following terms will apply:
      i. The effective date of termination will be the last day of the Performance Year.
      ii. Between the date CMS receives the notice of termination and the last day of the Performance Year, the Primary Care First Practice will be in the Reconsideration Period.
      iii. During the Reconsideration Period, CMS will continue to make Primary Care First Payments to the Primary Care First Practice for primary care services furnished to PCF Component Beneficiaries.
      iv. The Primary Care First Practice may withdraw its notice of termination, in writing, during the Reconsideration Period; however, CMS must receive this written notice no later than 30 days before the last day of the Performance Year.
      v. If the Primary Care First Practice terminates this Participation Agreement after February 28 in any Performance Year, CMS may prohibit the Primary Care First Practice from participating in another CMS alternative payment model for 1 calendar year, beginning on the effective date of termination of the Agreement.
   b. CMS retains the discretion to exempt the Primary Care First Practice from the Primary Care First Participation Agreement, Section 15.04.
   c. Primary Care First Practice Management will schedule a call to review the scenario specific to your practice.

7. Medicare Shared Savings Program
   a. If your practice intends to join the Shared Savings Program while participating in Primary Care First, you are required to notify Primary Care First Support within 30 days of becoming a Shared Savings Program Accountable Care Organization (ACO) participant.
   b. Additionally, you are required to notify Primary Care First Support when you decide to join a Shared Savings Program ACO or receive notice of your acceptance or denial in the Shared Savings Program.
      i. If you are accepted, it is highly recommended that your practice submit a written statement signed by a leadership representative of the Shared Savings Program ACO to CMS via the Primary Care First Support communication channels (either phone or email). This statement should acknowledge that your practice's participation in Primary Care First may affect the ACO's total expenditures and, if applicable, acknowledge that any Primary Care First payments made to your practice will be segregated from all other funds of the ACO and will be used solely by the Primary Care First Practice.

c. Reference Portal How-To Section 2.2.3(b) for viewing your practice's Shared Savings Program information.

8. Acquisition/Change of Ownership

    a. A practice acquisition or change of ownership occurs when the practice continues to operate normally but is owned or operated by a new owner.

    b. If your practice acquires or is acquired by another practice, your practice must provide Primary Care First Support with at least 60 days of advance notification.

9. Mergers

    a. CMS defines a merger as a blending of two unique practice sites into one to create one physical practice location.

    b. If your practice merges with another practice, your practice must provide Primary Care First Support with at least 60 days of advance notification.

10. Primary Care First Practices with Multiple Physical Locations

    a. Satellites

        i. A satellite is defined as a physical location separate from the practice site that has the same health IT, Certified Electronic Health Record (EHR) Technology, and practitioners as the practice site, and operates under the same TIN as the practice site.

        ii. A satellite practice shares the same resources (e.g., management, TIN, practitioners, EHR, attributed beneficiaries, and health IT systems); however, being in the same medical group or health system does not constitute being a satellite practice.

        iii. All or a subset of eligible practitioners from the original site should work at the satellite location on a part-time basis only. All practitioners at the satellite site must work at the main Primary Care First location. Specialty practitioners (e.g., cardiologist, hospitalist) may work solely at the satellite site and not at the main Primary Care First location.

        iv. The Primary Care First Practice shall provide written notice to CMS at least 60 days before the addition of any satellite office(s). CMS will determine whether the satellite office qualifies as such under the model. This obligation remains in effect until the end of the Model Performance Period.

        v. Primary Care First Practice Management will schedule a call to review the scenario specific to your practice.

    b. Adding a practice site: The two allowable circumstances for a practice site to add a second location are (1) opening a satellite site, or (2) splitting a practice site into two practice sites. Table 1 describes the requirements for each circumstance.

Table 1
Adding a Practice Site

Addition	Satellite Site	Practice Split
Description	An additional site opened to accommodate a patient panel that is geographically dispersed.	A geographic extension of the original practice site, as a result of natural growth of the patient panel/volume and physical space limitations at the current practice location.
Shared resources	All or a subset of primary care practitioners from the initial Primary Care First practice must work at the satellite location. The satellite location cannot exist solely of new practitioners. The exception to this rule is for specialists who do not meet the definition of a Primary Care First practitioner. Both sites share the same personnel, management, practitioners, EHR, beneficiaries, and other resources. Note that each site can have separate administrative staff.	Both sites share the same management, health IT, and EHR but may have different personnel and practitioners. It is required that Primary Care First practitioners from the original site be spread between the sites for purposes of continuity and likelihood of success. CMS will not approve a new practice site without practitioners with Primary Care First experience from the original site.
Clinical requirements	All practitioners at the satellite location must also practice at the main Primary Care First Practice Site.	Practitioners may work at one or both locations. All practitioners should be listed on the practitioner roster at the original practice until the new practice is added. Once the new practice is added, at the start of the following calendar year, practitioners can be listed on only one roster.
Primary Care First payments	CMS considers the satellite site to be part of the Primary Care First Practice Site, and payments from Primary Care First will not be split between the original practice site and satellite location.	CMS will make payments to the new practice per the payment schedule.

2. *Practice Management: PCF Practice Portal How-To*

Your practice will submit requests to update your practitioner roster, staff roster, TIN, and organizational affiliation through the Primary Care First Practice Portal. The Primary Care First Practice Management team will review each request and notify your practice if your request is approved or rejected and request additional information as appropriate. Step-by-step instructions for each of these composition changes are provided below.

More complex changes in practice management, such as practice mergers, acquisitions, and practice splits, as well as staffing, ownership, or location updates will require more information and must be submitted as soon as your practice has any indication of a possible change. Communicate updates to Primary Care First Support at 888-517-7753 or PCF@telligen.com.

2.1 Practice Demographic

The Demographic Information page displays your practice's demographic information and contacts. From this page, your practice can update the following:

1. Practice Address Update
    a. Log onto the Primary Care First Practice Portal
    b. Select "My Practice Info"
    c. Select "Demographic Information"
    d. Select "Edit Information," located inside a blue box
    e. Edit practice address and/or phone/fax numbers
    f. Select "Save"
2. Practice Contact Update
    a. Log onto the Primary Care First Practice Portal
    b. Select "My Practice Info"
    c. Select "Demographic Information"
    d. Select "Edit Information," located inside a blue box
    e. Edit practice contact information (Primary, Secondary, Practice Executive Lead, and/or Health IT)
    f. Select "Save"

2.2 Practice Information

1. Practice Name Change Request
    a. Log onto the Primary Care First Practice Portal
    b. Select "My Practice Info"
    c. Select "Practice Information"
    d. Select "Edit Name," located inside a blue box
    e. Under "Change Practice Name," complete as follows:
        i. Under "Please select all that apply for the type of change requested," select the box to the left of Practice Name and/or Practice Legal Name
        ii. Update the "New Practice Name" and/or "New Practice Legal Name"
        iii. Complete "Reason for Name Change" in the free text field provided
        iv. Enter Effective Date as MM/DD/YYYY
    f. Under "Confirmation," complete as follows:

i. Acknowledge the submission by selecting the checkbox
ii. Select “Save”

2. Organizational Change Request

    a. Organization Details

        i. Ownership and Organization Demographic/Contact Information

            1. Log onto the Primary Care First Practice Portal
            2. Select “My Practice Info”
            3. Select “Practice Information”
            4. Select “Edit Organization Details,” located inside a blue box
            5. Under “Change Organization Name, Address and Contact,” complete as follows:

                a. Indicate whether your practice is owned by another healthcare organization, such as a group practice, hospital, or health system, by selecting “Yes” or “No”

                    i. If Yes:

                        1. Update the Organization name and demographic information
                        2. Enter Effective Date as MM/DD/YYYY
                        3. Update Organization Contact name and demographic information

                    ii. If No:

                        1. Indicate who owns your practice (select all that apply)
                        2. Enter Effective Date as MM/DD/YYYY

            6. Under “Confirmation,” complete as follows:

                a. Acknowledge the submission by selecting the checkbox
                b. Select “Save”

            7. If associated with a Practice Acquisition/Change of Ownership, under “Supporting Documentation,” complete as follows:

                a. Select “Select File,” located inside a blue box
                b. Upload the completed and signed Novation Agreement
                c. Select “Upload All,” located inside a green box
                d. Exit the request

3. Organization information update

    a. Practice Organizational NPI and Practice PTAN

        i. Log onto the Primary Care First Practice Portal
        ii. Select “My Practice Info”
        iii. Select “Practice Information”
        iv. Select “Edit Organization Info,” located inside a blue box
        v. Under “Organization Information,” complete one or both as follows:

            1. Under “Please provide your Practice Organizational NPI,” update your practice’s Organizational NPI
            2. Under “PTAN (Medicare ID) for your practice,” update your practice’s PTAN
            3. Select “Save”

    b. Medicare Shared Savings Program

i. View only, unable to edit

2.3 Practice Composition

1. Practitioner Change Request/Update

   a. Add Practitioner Change Request
      i. Log into the Primary Care First Practice Portal
      ii. Select “My Practice Info”
      iii. Select the “Composition” tab
      iv. Navigate to the “Practitioner Roster”
      v. Select “Add Practitioner,” located inside a blue box
      vi. Complete the required fields under “Add Practitioner”
      vii. Under “Confirmation,” complete as follows:
         1. Acknowledge the submission by selecting the checkbox
         2. Enter your position with the Primary Care First Practice Site
         3. Select “Save”

   b. Withdraw Practitioner Change Request
      i. Log into the Primary Care First Practice Portal
      ii. Select “My Practice Info”
      iii. Select the “Composition” tab
      iv. Navigate to the “Practitioner Roster”
      v. Select the “Withdraw” icon to the right of the practitioner to be withdrawn
      vi. Complete the required fields under “Withdraw Practitioner”
      vii. Under “Confirmation,” complete as follows:
         1. Acknowledge the submission by selecting the checkbox
         2. Enter your position with the Primary Care First Practice Site
         3. Select “Withdraw”

   c. Practitioner Designation Update
      i. Log into the Primary Care First Practice Portal
      ii. Select “My Practice Info”
      iii. Select the “Composition” tab
      iv. Navigate to the “Practitioner Roster”
      v. Select the Practitioner Name for the practitioner changing designations
      vi. Select “Edit Information,” located inside a blue box
      vii. Under “Practitioner Details,” indicate which practice type this practitioner supports
      viii. Select responses to any remaining required questions
      ix. Select “Save”

2. Data Custodian Change Request

   a. Add Data Custodian Contact
      i. Log into the Primary Care First Practice Portal
      ii. Select “My Practice Info”
      iii. Select the “Composition” tab
      iv. Navigate to the “Data Custodian Roster”
      v. Select “Add Data Custodian,” located inside a blue box
      vi. Complete the required fields under “Add Data Custodian”
      vii. Under “Confirmation,” complete as follows:

1. Acknowledge the submission by selecting the checkbox
2. Enter your position with the Primary Care First Practice Site
3. Select "Save"

b. Withdraw Data Custodian Contact
    i. Log into the Primary Care First Practice Portal
    ii. Select "My Practice Info"
    iii. Select the "Composition" tab
    iv. Navigate to the "Data Custodian Roster"
    v. Select the "Withdraw" icon to the right of the Data Custodian to be withdrawn
    vi. Complete the required fields under "Withdraw Data Custodian Contact," which will include adding a new Data Custodian
    vii. Under "Confirmation," complete as follows:
        1. Acknowledge the submission by selecting the checkbox
        2. Enter your position with the Primary Care First Practice Site
        3. Select "Withdraw"

3. Staff Roster Update
    a. Add Staff
        i. Log into the Primary Care First Practice Portal
        ii. Select "My Practice Info"
        iii. Select the "Composition" tab
        iv. Navigate to the "Staff Roster"
        v. Select "Add Staff," located inside a blue box
        vi. Complete the required fields under "Add Staff"
        vii. Select "Save"
    b. Withdraw Staff
        i. Log into the Primary Care First Practice Portal
        ii. Select "My Practice Info"
        iii. Select the "Composition" tab
        iv. Navigate to the "Staff Roster"
        v. Select the "Withdraw" icon to the right of the staff to be withdrawn
        vi. Complete the required fields under "Withdraw Staff"
        vii. Select "Save"
4. TIN Change Request
    a. Add TIN
    When adding a TIN, the practice signatory authority and POC are required to complete and sign a TIN Change Acknowledgement form, which is uploaded as supporting documentation when submitting the Add TIN request via the Primary Care First Practice Portal.
        i. Obtain a copy of the TIN Change Acknowledgement to complete prior to submission as follows:
            1. Log onto the Primary Care First Practice Portal
            2. Select "My Practice Info"
            3. Select "Practice Documents"
            4. Select the box to the left of "Document Repository"
            5. Search for the TIN Change Acknowledgement

ii. The TIN Change Acknowledgement is a fillable form, which will allow practices to complete some of the information using a computer. Please complete the fields of this form as follows:
   1. Practice Name: Enter the current name of the practice
   2. Primary Care First ID#: Enter the Primary Care First ID of the practice. Once populated, it should auto-populate the Primary Care First ID field in #5
   3. Practice POC: Enter the name of the current POC
   4. Complete fillable fields 1 through 4, which pertain to the New TIN
   5. Fields 6 through 12 must be completed by the Signature Authority and POC. Please print a copy to complete these non-fillable fields manually. Please Note: This form cannot be electronically signed or dated. Please confirm that the file names for the supporting documentation contain only letters, numbers, periods, dashes, and underscores, with no spaces or special characters.

iii. Submit the Add New TIN request via the Primary Care First Practice Portal, with the completed and signed TIN Change Acknowledgement form uploaded as supporting documentation, as follows:
   1. Log into the Primary Care First Practice Portal
   2. Select “My Practice Info”
   3. Select the “Composition” tab
   4. Navigate to the “Practice TIN History”
   5. Select “Add TIN,” located inside a blue box
   6. Under “Add Tax Identification Number (TIN),” complete as follows:
      a. Enter New TIN
      b. Enter Effective Date as MM/DD/YYYY
      c. Indicate whether the New TIN should be the practice Primary TIN
      d. Select All That Apply from the list of reasons for the TIN change
      e. Indicate whether this TIN change will or will not necessitate a change in your practice’s banking information
   7. Under “Confirmation,” complete as follows:
      a. Acknowledge the submission by selecting the checkbox
      b. Enter your position with the Primary Care First Practice Site
      c. Select “Save”
   8. Under “Supporting Documentation,” complete as follows:
      a. Select “Select File,” located inside a blue box
      b. Upload the completed and signed TIN Change Acknowledgement form
      c. Select “Upload All,” located inside a green box
      d. Exit the request

b. Withdraw TIN
   i. Log into the Primary Care First Practice Portal
   ii. Select “My Practice Info”
   iii. Select the “Composition” tab
   iv. Navigate to the “Practice TIN History”
   v. Select the “Withdraw” icon to the right of the TIN to be withdrawn
   vi. Under “Withdraw Tax Identification Number (TIN),” complete as follows:

1. Enter Effective Date as MM/DD/YYYY
2. Enter the “Reason for TIN Withdrawal” in the free text field provided
3. Under “Confirmation,” complete as follows:
    a. Acknowledge the submission by selecting the checkbox
    b. Enter your position with the Primary Care First Practice Site
    c. Select “Withdraw”

c. Primary TIN Switch
When switching a Primary TIN, the practice signatory authority and POC are required to complete and sign a TIN Change Acknowledgement form, which is uploaded as supporting documentation when submitting the Primary TIN Switch request via the Primary Care First Practice Portal.
    i. Obtain and complete a copy of the TIN Change Acknowledgement prior to submission as follows:
        1. Log onto the Primary Care First Practice Portal
        2. Select “My Practice Info”
        3. Select “Practice Documents”
        4. Select the box to the left of “Document Repository”
        5. Search for the TIN Change Acknowledgement
    ii. The TIN Change Acknowledgement is a fillable form, which will allow practices to complete some of the information using a computer. Please complete the fields of this form as follows:
        1. Practice Name: Enter the current name of the practice.
        2. Primary Care First ID#: Enter the Primary Care First ID of the practice. Once populated, it should auto-populate the Primary Care First ID field in #5.
        3. Practice POC: Enter the name of the current POC.
        4. Complete fillable fields 1 through 4, which pertain to the New TIN.
        5. Fields 6 through 12 must be completed by the Signature Authority and POC. Please print off a copy to complete these non-fillable fields manually.
        Please Note: This form cannot be electronically signed or dated. Please confirm that the file names for the supporting documentation contain only letters, numbers, periods, dashes, and underscores, with no spaces or special characters.
    iii. Submit the Primary TIN Switch request via the Primary Care First Practice Portal with the completed and signed TIN Change Acknowledgement form uploaded as supporting documentation as follows:
        1. Log into the Primary Care First Practice Portal
        2. Select “My Practice Info”
        3. Select the “Composition” tab
        4. Navigate to the “Practice TIN History”
        5. Select the “Primary TIN Switch,” located inside a blue box, to the right of the TIN you would like to make primary
        6. Under “Switch Primary TIN,” complete as follows:
            a. Indicate that you want to designate this TIN as primary
            b. Enter the “Reason for TIN Switch” in the free text field provided
        7. Under “Confirmation,” complete as follows:

    a. Acknowledge the submission by selecting the checkbox
    b. Enter your position with the Primary Care First Practice Site
    c. Select “Save”

8. Under “Supporting Documentation,” complete as follows:
    a. Select “Select File,” located inside a blue box
    b. Upload the completed and signed TIN Change Acknowledgement form
    c. Select “Upload All,” located inside a green box
    d. Exit the request

5. Practice Mergers, Practice Acquisitions, Practice Withdrawals, Practice Designation Changes, Practice Splits, and Satellites
    a. For any of the practice changes listed above, contact Primary Care First Support via 888-517-7753 or PCF@telligen.com
        i. A member of the Practice Management team will discuss applicable steps with you regarding your practice’s status change
        ii. The Practice Management team will provide a step-by-step guide for your practice to complete the process