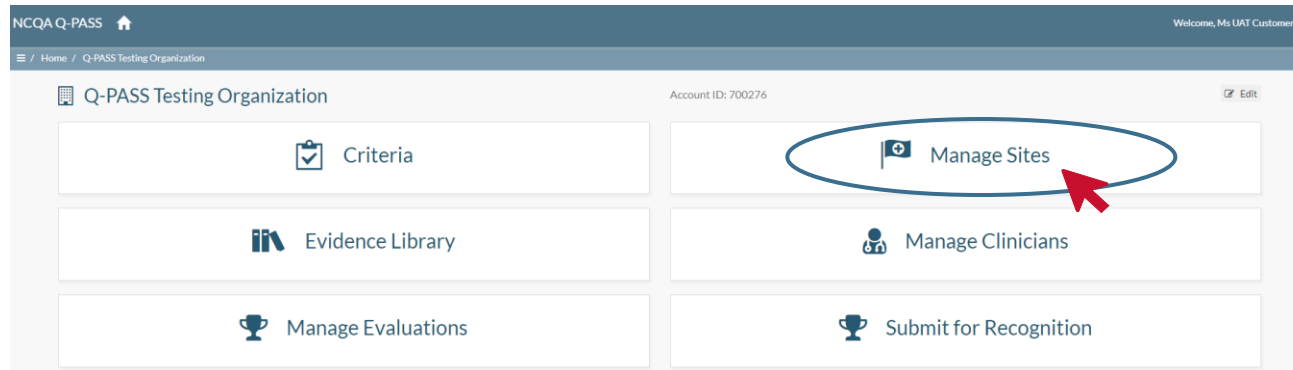


## Update Practice Site Information

### STEP 1

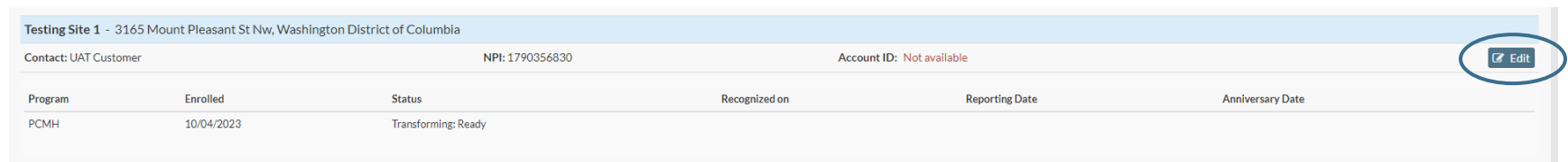
Go to [qpass.ncqa.org](https://qpass.ncqa.org)

From the Organization Dashboard, select **Manage Sites**



### STEP 2

Select the **Edit** button next the practice site.



The screenshot shows a practice site entry for 'Testing Site 1 - 3165 Mount Pleasant St Nw, Washington District of Columbia'. The entry includes contact information, NPI, and account ID. Below this is a table with columns for Program, Enrolled, Status, Recognized on, Reporting Date, and Anniversary Date. The 'Edit' button is circled in blue.

Program	Enrolled	Status	Recognized on	Reporting Date	Anniversary Date
PCMH	10/04/2023	Transforming: Ready			

From this page, you can edit the **site name, certificate name, phone number, Tax ID number, and primary contact**. Click **Save** at the bottom right corner to save any changes.

**Site Name**

**Certificate Name** Use site name

**Street**

**City**

**State**

**Zip**

**Telephone**

**Extension**

**Tax ID number**  


Incentive payments received may be dependent on accurate Tax ID data. If an accurate Tax ID is not provided or the field is left blank, disruption of incentives by a state or third party payor may result.

**Primary contact**  
 Edit

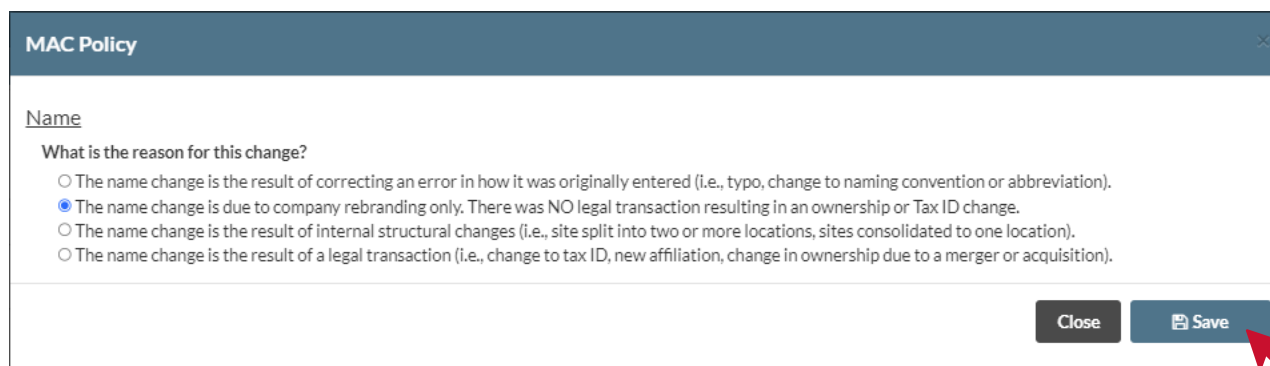
**Specialties**  

Select this site's specialties below. If yours is not listed, check "other".

<input type="checkbox"/> Allergy/Immunology <input type="checkbox"/> Chiropractor <input type="checkbox"/> Gastroenterology <input type="checkbox"/> Infectious Disease <input type="checkbox"/> Neurosurgery <input type="checkbox"/> Oncology <input type="checkbox"/> Other - not listed <input type="checkbox"/> Plastic Surgery <input type="checkbox"/> Psychopharmacology <input type="checkbox"/> Sleep Medicine	<input type="checkbox"/> Anesthesiology <input type="checkbox"/> Critical Care Services <input type="checkbox"/> Gen/Fam Practice <input checked="" type="checkbox"/> Internal medicine <input type="checkbox"/> Obesity Medicine <input type="checkbox"/> Ophthalmology <input type="checkbox"/> Otolaryngology <input type="checkbox"/> Podiatry <input type="checkbox"/> Pulmonary Medicine <input type="checkbox"/> Surgery	<input type="checkbox"/> Behavioral Health <input type="checkbox"/> Dermatology <input type="checkbox"/> Geriatric Medicine <input type="checkbox"/> Nephrology <input type="checkbox"/> Obstetrics/Gynecology <input type="checkbox"/> Oral/maxillofacial surgery <input type="checkbox"/> Pediatrics <input type="checkbox"/> Preventive Medicine <input type="checkbox"/> Radiology (diagnostic) <input type="checkbox"/> Urology	<input type="checkbox"/> Cardiology <input type="checkbox"/> Endocrinology <input type="checkbox"/> Hematology <input type="checkbox"/> Neurology <input type="checkbox"/> Occ. Medicine <input type="checkbox"/> Orthopedics <input type="checkbox"/> Phys/Rehab Medicine <input type="checkbox"/> Psychiatry <input type="checkbox"/> Rheumatology
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Cancel
Save

When making changes to the practice site information, a notification will appear asking you to provide a reason for changing the organization information, in accordance with our **MAC policy** (PCMH Standards and Guidelines, Appendix 6). Make the appropriate selection and click **Save**.



The screenshot shows a dialog box titled "MAC Policy" with a close button in the top right corner. Below the title bar, the word "Name" is underlined. The main content area asks "What is the reason for this change?" and lists four radio button options. The second option is selected. At the bottom right, there are two buttons: "Close" and "Save". A red arrow points to the "Save" button.

**MAC Policy** ×

Name

**What is the reason for this change?**

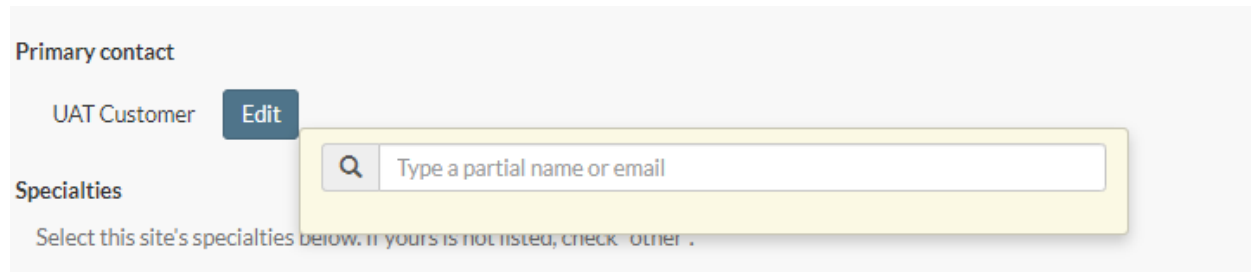
- The name change is the result of correcting an error in how it was originally entered (i.e., typo, change to naming convention or abbreviation).
- The name change is due to company rebranding only. There was NO legal transaction resulting in an ownership or Tax ID change.
- The name change is the result of internal structural changes (i.e., site split into two or more locations, sites consolidated to one location).
- The name change is the result of a legal transaction (i.e., change to tax ID, new affiliation, change in ownership due to a merger or acquisition).

Close Save

After clicking Save, a case will be created and assigned to your NCQA Representative, notifying them of the changes made and the reason selected. The representative will review the case and reach out for more information if a possible **Merger, Acquisition or Consolidation** has been identified. You will be notified via email and My.NCQA when the representative responds to the case.

### STEP 3

To edit the primary contact for a site, click the **Edit** button next to the current primary contact's name and **enter the name or email address associated with the new contact's Q-PASS account in the field provided.**



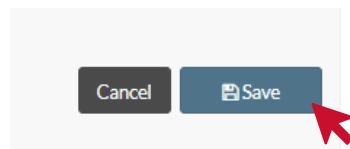
The screenshot shows a form titled "Primary contact". Under the heading "UAT Customer", there is a name "UAT Customer" and a blue "Edit" button. Below this is a search input field with a magnifying glass icon and the placeholder text "Type a partial name or email". Under the heading "Specialties", there is a text prompt: "Select this site's specialties below. If yours is not listed, check 'Other'."

A drop-down will appear, and the user can be selected from there. **The user must be registered in Q-PASS and have access to the organization's account to appear in the drop-down.**

If an organization has multiple practice sites, the primary contact must be changed individually for each site.

### STEP 4

Select **Save** to save changes.

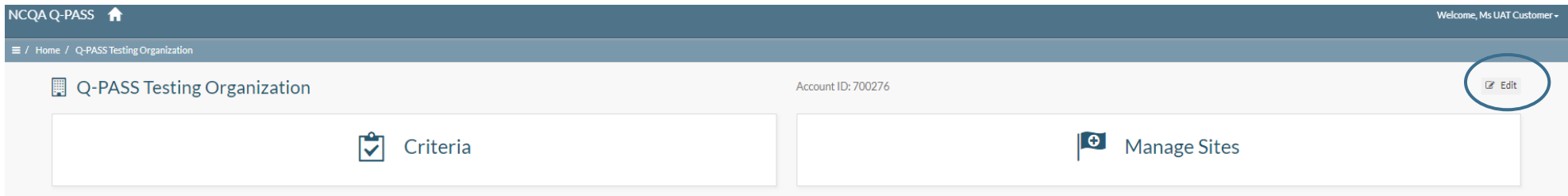


The screenshot shows two buttons: a dark grey "Cancel" button and a blue "Save" button with a white floppy disk icon. A red arrow points to the "Save" button.

## Update Organization Information

### STEP 1

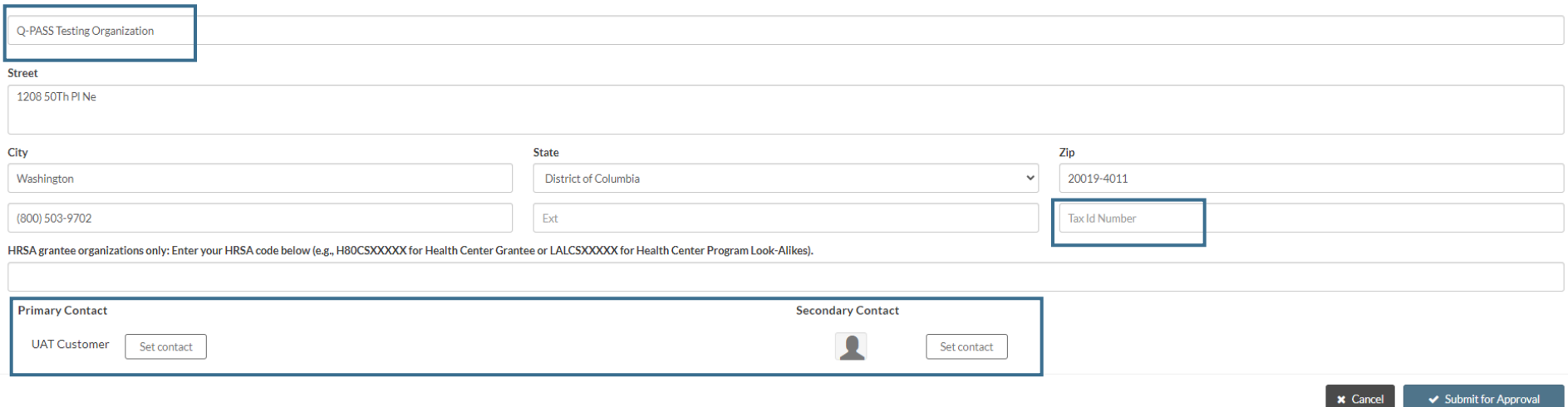
To update information at an organization level, select the **Edit** button in the top right-hand corner of the organization dashboard next to the organization name.



The screenshot shows the NCQA Q-PASS organization dashboard. At the top, there is a navigation bar with "NCQA Q-PASS" and a home icon on the left, and "Welcome, Ms UAT Customer" on the right. Below the navigation bar, the breadcrumb "Home / Q-PASS Testing Organization" is visible. The main content area features a header with "Q-PASS Testing Organization" and "Account ID: 700276". On the right side of this header, there is an "Edit" button circled in blue. Below the header, there are two main action buttons: "Criteria" (with a clipboard icon) and "Manage Sites" (with a plus icon).

From here, you can edit the **organization name, Tax ID number, and assign a primary and/or secondary contact**. Select **Submit for Approval** to save changes.

### Edit Organization

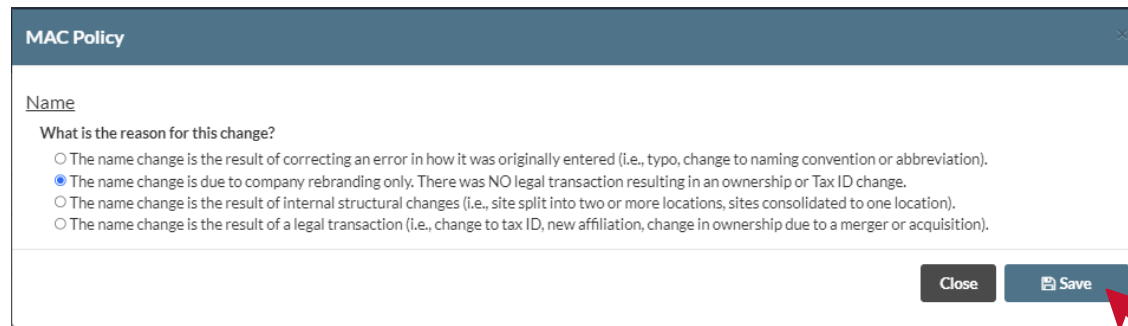


The "Edit Organization" form contains the following fields and sections:

- Organization Name:** A text input field containing "Q-PASS Testing Organization", highlighted with a blue box.
- Street:** A text input field containing "1208 50Th PI Ne".
- City:** A text input field containing "Washington".
- State:** A dropdown menu showing "District of Columbia".
- Zip:** A text input field containing "20019-4011".
- Ext:** A text input field containing "(800) 503-9702".
- Tax Id Number:** A text input field, highlighted with a blue box.
- HRSA code:** A text input field with the instruction: "HRSA grantee organizations only: Enter your HRSA code below (e.g., H80CSXXXXX for Health Center Grantee or LALCSXXXXX for Health Center Program Look-Allikes)." and an empty input field.
- Contact Information:** Two sections, "Primary Contact" and "Secondary Contact", each with a "Set contact" button. The "Primary Contact" section shows "UAT Customer" and the "Secondary Contact" section shows a person icon.
- Buttons:** "Cancel" and "Submit for Approval" buttons at the bottom right, with a red arrow pointing to the "Submit for Approval" button.

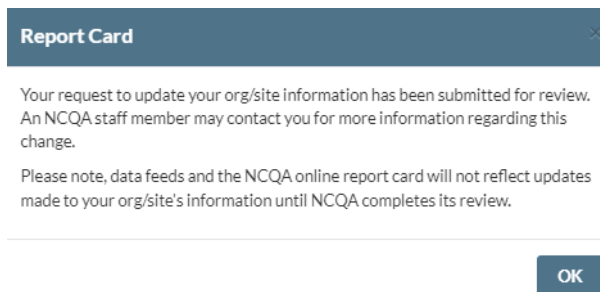
STEP 2

A notification will appear asking you to provide a reason for changing the organization information, in accordance with our **MAC policy** (PCMH Standards and Guidelines, Appendix 6). Make the appropriate selection and click **Save**.



The screenshot shows a dialog box titled "MAC Policy" with a close button (X) in the top right corner. Below the title bar, the word "Name" is underlined. The main content area asks "What is the reason for this change?" and lists four radio button options: "The name change is the result of correcting an error in how it was originally entered (i.e., typo, change to naming convention or abbreviation).", "The name change is due to company rebranding only. There was NO legal transaction resulting in an ownership or Tax ID change." (which is selected), "The name change is the result of internal structural changes (i.e., site split into two or more locations, sites consolidated to one location).", and "The name change is the result of a legal transaction (i.e., change to tax ID, new affiliation, change in ownership due to a merger or acquisition).". At the bottom right of the dialog box, there are two buttons: "Close" and "Save". A red arrow points to the "Save" button.

After clicking Save, a case will be created and assigned to your NCQA Representative, notifying them of the changes made and the reason selected. The representative will review the information and reach out for more information if a possible **Merger, Acquisition or Consolidation** has been identified. You will be notified via email and My.NCQA when the representative responds to the case. Note that updates to the Report Card will not be reflected until NCQA reviews changes.



The screenshot shows a dialog box titled "Report Card" with a close button (X) in the top right corner. The main content area contains two paragraphs of text: "Your request to update your org/site information has been submitted for review. An NCQA staff member may contact you for more information regarding this change." and "Please note, data feeds and the NCQA online report card will not reflect updates made to your org/site's information until NCQA completes its review." At the bottom right of the dialog box, there is an "OK" button.