



WALTERS & ASSOCIATES
— CPAS —
CERTIFIED PUBLIC ACCOUNTANTS

HOW TO OBTAIN YOUR PS&R

Need Help?

Call 1-866-484-8049, option 2 for CMS Portal Login Issues.

STEP 1

How to Register for a User ID and Password:

** If you do not have a User ID and Password, you will have to register and provide some personal information about yourself, and then create a User ID and Password of your own choosing.

Please follow these steps:

1. Navigate to <https://portal.cms.gov>.
2. On the CMS Portal page, select the New User Registration link.
 - a. Choose Your Application as **PSR/STAR: Provider Statistical and Reimbursement/System for Tracking Audit and Reimbursement**.
3. Accept the Terms and Conditions.
4. Provide the information requested on the “Your Information” page.
5. Create a User ID and Password on the “Choose User ID and Password” page.
6. Complete the “Select your Challenge Questions and Answers” section.
7. Submit the Registration. You will receive an email acknowledging a successful registration and the email will include your User ID.

STEP 2

How to Request Access to the PS&R

The following are key steps on how to request access to an application and a role. Have your Employer Identification Number (EIN) letter handy as the Company name you register must match exactly (commas, abbreviations, etc.).

1. If you already have a User ID and Password, navigate to <https://portal.cms.gov>.
2. On the CMS Portal page, select the Login in to CMS Secure Portal link.

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3. Accept the Terms and Conditions.
4. Log in with your User ID and Password. You may log in with an IACS User ID and Password, if you have one).
5. On the Welcome to CMS Enterprise Portal page, select the down arrow icon that appears next to your name at the top of the page.
6. After the Access Catalog is displayed; find the PS&R/STAR Application and select Request Access.
7. Provide your Business Contact Information, if it is not already on file (EIDM will prompt you if this is needed).
8. Select the Security Official Role.
9. Enter and select the appropriate information needed to complete your request for access (EIDM will prompt you if this is needed).
10. Review your request information on the review page and then submit the request.
11. EIDM provides you with a tracking number and will email you when the request is received. They will ask you to provide the CP575 Form. This is the IRS Letter you received with the company EIN.
12. Fax or email the EIN Letter (CP575 Form) as instructed.
13. Await email from CMS granting you access to the actual PS&R report. Once this email is received, your same UN and PW will work to pull the PS&R report.

STEP 3

Once you have Access to the PS&R

1. Go to www.psr-ui.cms.hhs.gov/psr-ui/
2. Click on "I accept" for their terms of use

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3. Enter User ID and Password as directed
4. At the top of screen, click on "Request Report"
5. At the top of screen, click on "Request Summary"
6. Click within area beside "By Service Type" to select it, then click on "continue"
7. Populate the YEAR as "01/01/2017" (or enter the appropriate year for the report you need), then click on "apply"
8. You will see Period timeframes listed horizontally, leave Period 1 blank, and click on Period 2, 3 and 4 to exclude these periods.
9. Leave area #3 as is, and click "continue"
10. Area 4 is where you choose the formats for the PS&R report, please select BOTH PDF and CSV formats, then click "continue"
11. Go to bottom of screen and click "Submit"
12. Click on "Report Inbox" at the top of the screen
13. The status will reflect as "Queued," then "Processing," then "Completed." Keep clicking on the "REFRESH" button until it shows "Completed."
14. Once the report is "Completed," it is ready, click on PDF version and save accordingly, then click on the CSV version and save accordingly. Then please forward the report in both formats to Walters & Associates via email attachments. Thank you.

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