Contents
Logging in to Certification Portal .............................................................................................................. 3
Navigating Certification Portal .................................................................................................................. 6
   How to Select Your Persona .................................................................................................................. 6
   How to Change Your Persona ............................................................................................................... 6
Navigating the Organization Home Page .............................................................................................. 7
System Notifications ............................................................................................................................. 8
Updating Practice Profile Information ...................................................................................................... 8
   Adding Users ......................................................................................................................................... 8
   Removing Users .................................................................................................................................... 9
   Editing User Settings ........................................................................................................................... 10
   Updating NPI and Site Counts ............................................................................................................. 11
Site Addresses ........................................................................................................................................ 12
   Practice Name Change ........................................................................................................................ 13
   Practice Transaction Request ............................................................................................................ 14
Applying for APC4 Certification ............................................................................................................... 15
   Eligibility and Agreement .................................................................................................................... 17
   APC4 Questionnaire ............................................................................................................................ 18
Payment .............................................................................................................................................. 21
Pre-Survey Documents ........................................................................................................................ 23
Site Survey ........................................................................................................................................ 27
Certification Compliance Report Review ............................................................................................ 28
Upload Action Plan .............................................................................................................................. 30
Document Implementation of Action Plan .......................................................................................... 30
Certification Decision .......................................................................................................................... 32
Contact Us ........................................................................................................................................... 32
Logging in to Certification Portal

1. Login to the ASCO Certification Portal using ASCO username and password. Users can reset passwords as needed by clicking on Need Help button.

2. If you forgot your password, then click on the forgot password.
3. Provide your email address and submit, and you will receive guidance on how to reset the password.

4. If you forgot username, please click forgot username.

5. Provide your email address and submit, you will receive the email to retrieve your username.
6. Create an account if you don’t have an ASCO account.

7. Login to the ASCO Certification Portal using ASCO username and password.
8. If your ASCO user account is not yet associated with your practice’s ASCO Certification Portal Account, you will need to provide the following information upon login: Practice Name, Practice ID number, and Primary Practice Address. Please enter this information when prompted and click Save. Certification staff will review your request within 1-2 business days and send an email with instructions.
Navigating Certification Portal

How to Select Your Persona

After logging in, choose Organization Representative to review practice profile, applications, program documents, and certification history. If you are associated with more than one practice account, you will need to select which practice account you would like to access. If you do not have the Organization Representative persona, please contact patientcenteredcare@asco.org.

If you click on the My Items persona instead, you will land on the page below which will not show your complete practice information. To change to Organization Representative persona, please follow the steps below.

How to Change Your Persona

Click Me profile button in top right corner, then click Change My Persona.
Choose Organization Representative persona. If you do not see the Organization Representative persona, please contact patientcenteredcare@asco.org.

Navigating the Organization Home Page
The organization Home page is where you will find active applications and certification history for your practice. Please see below list for descriptions of the other menu tabs.
1. **Profile** – review and edit practice profile information including contacts, public profile, and number of sites and FTEs.

2. **Contacts** – review and edit practice contacts, update primary contact.

3. **Applications** – review and access practice applications, see current application status.

4. **Certifications** – review practice certification dates and status.

5. **Processes** – review and access practice processes such as APC4 Certification Application Process.

6. **Issues** – review any Issues reported in your survey report for any unmet Standards and upload resolution documents.

7. **Standards** – review the latest ASCO Standards.

8. **Instruments** - review assigned application forms or “instruments” such as Questionnaires and Pre-survey Documents with progress noted and a link to that specific application instrument.

9. **Documents** - review a library of submitted application documents or click “Shared” to view shared program documents.

10. **Requests** - submit requests to APC4 Staff such as Practice Name Change and Add New User to Practice Account.

11. **Active Applications** – view current in process applications.

**System Notifications**

All trusted contacts receive system notifications. Notifications from the ASCO Certification Portal will come from the no reply email caredelivery-nr@asco.org Please add this email to your address book to avoid system notifications going to junk or spam. For any APC4 questions please reach out to patientcenteredcare@asco.org.

**Updating Practice Profile Information**

**Adding Users**

Click from the Requests drop-down menu and select Add New User to Practice Account
Complete the following form with the new user information and submit

Once the request is submitted, APC4 Staff will review and send a notification to the new user within 1-2 business days.

Removing Users
You can remove a user by clicking on the number 1 button below and then click number 2 button.
Editing User Settings
Click on Contacts tab to review practice contacts. Click on a contact’s name to review their information and update settings.

Update Trusted Contact
Under Contact Access check “This contact may act on behalf of the organization” to mark person as a trusted contact which will allow them to access the practice’s ACP4 application. **Note:** all trusted contacts will receive system notifications regarding the application process.

Update Primary Contact
Under Contact Access check “This is the organization’s Primary Contact” to mark person as Primary Contact. **Note:** only one person may be selected as Primary Contact.
Updating NPI and Site Counts
Click on Profile tab, then Additional Info, Click on the Edit button. You can update the Number of Sites and Number of NPI.
Site Addresses
Click the Profile tab, then Contact Management, click the button number 1, then number 2, you will be able to update the Practice Address.

You can add a new address for the Practice by clicking on the Plus sign then select Address.

Fill in the Address, only one address should be selected as Main and Primary Address. Then Save.
* Any additional addresses should be marked as Site in the Address Type.
Practice Name Change
To change the name of the Practice, click Home tab then select Practice Name Change Request, then Submit.
Enter the new name of the Practice and Effective Date, then Upload the completed document to request change in the system. Then Submit.

Practice Transaction Request
To notify APC4 about a Practice Transaction such as a merger or sale/acquisition, click the Practice Transaction Request under Requests section, then click Submit.

Choose the structure of the transaction, fill in the Effective Date, and Upload the document after you download, complete, and sign the document. Then Submit.
Applying for APC4 Certification
From Home page click Apply for Certification.

Under Application Type choose ASCO Patient-Centered Cancer Care Certification and click Save.
From Home page under Active Applications, click on ASCO Patient-Centered Cancer Care Certification.

The APC4 Application will launch and items that need to be completed will be listed under My Activities.

Click Milestones to view all application milestones and current status.
Eligibility and Agreement

Under Eligibility Form click Add button.

Fill out the Eligibility Form with all required information and submit.
The Eligibility Form will go to staff for review. It takes about 3-5 business days for staff to complete the review and approve. If the Eligibility Form is approved, your practice’s legal contact listed in the form will receive an email from Docusign within 1-2 weeks, prompting them to sign the APC4 Participation Agreement.

All trusted contacts receive system notifications. Notifications from the ASCO Certification Portal will come from the no reply email caredelivery-nr@asco.org Please add this email to your address book to avoid system notifications going to junk or spam. For any APC4 questions please reach out to patientcenteredcare@asco.org.

APC4 Questionnaire
Once the legal document is signed and uploaded to the application, you will receive an email that you can access and complete the APC4 Questionnaire. Click the link in the email to access.

Click the Practice Profile. For you to be able to submit the Questionnaire, you need to reach 100% for Practice Profile.
Enter the Practice Profile information and save.

You need to add all the NPI information to complete the Profile. Please use Add button to add each NPI for the practice. When all NPIs have been added, click Done.
You will need to enter the Practice Sites info. All sections of form must be completed. Use the Add button to add additional practice sites. When all sites have been added, click Done.

Click Payer Participation and choose from the options for the question. Save.

Click Attestation.

Answer the question and save. And then Submit.
Confirm Submission and then Submit.

Staff will review your Questionnaire and upload the invoice, typically within 3-5 business days.

Payment
When your invoice is approved, you will receive the below email, prompting you to access the Download Invoice step in the application.

The Invoice and W9 can be accessed via the Document tab for download.
Click the Confirm button under My Activities once you have downloaded the invoice.
Please make the certification payment via check or wire transfer using the instructions on your invoice.

### Invoice Image

**Pre-Survey Documents**
While payment is pending, you can upload your Pre-Survey Policy Documents. Under Complete Pre-Survey Documents click on the APC4 Pre-Survey Documents link.
Click on each of the Domains and complete the required information.

Please upload written policies or procedures supporting each APC4 Certification Standard listed in the activity.
Add a Summary of the information that is relevant to the standard for each document submitted. If policy has sections, please reference the relevant sections in your summary. Remarks are optional to add. If more than one document is relevant to a Standard, click Add Row to upload.
Check the box for Confirmation section and save. Then Submit.

Confirm uploads by clicking Submit.

Repeat Process for Chemotherapy Safety Standards Pre-Survey Documents (if required, this will be assigned).

Confirm uploads by clicking Submit.
Site Survey

Once we receive your payment and all pre-survey documents, you will receive an email notification to schedule a site survey. Click the link in your email to complete the Site Survey Availability form.

Under My Activities click APC4 Site Survey Availability link to launch form.

Enter the information to indicate your site survey preferences. Please make sure to add a start and end date range. Then Submit.

After submission, your Site Survey Availability form will be reviewed by the APC4 team, and a proposed visit date will be sent to you via email within 4-6 weeks.
You will receive an email with your selected surveyor and survey date(s). Please reply within 5 business days to confirm the selected surveyor and the date. If we do not hear back regarding a conflict, we will move forward with confirming the visit.

Once the survey information is confirmed, you will receive the final confirmation email.

The pre-survey documents submitted by your practice will be reviewed by your assigned surveyor. Your surveyor will contact you to schedule the site survey planning call. Once the site survey is complete, your surveyor will draft the Certification Compliance Report (CCR) based on the findings and observations. You can expect to receive a notification to view the CCR within 4-6 weeks of the survey.

Certification Compliance Report Review
Once the APC4 Certification Compliance Report (CCR) and Chemotherapy Safety Standards Compliance Report (if required) is completed, you will receive an email with a link to access the report(s) and important due dates for compliance submissions (if applicable). The Action Plan in the email is due within 10 days of receiving the CCR if any Standards were unmet during the survey. You will receive the Action Plan template as an attachment.

Use the link in your email to access the APC4 Certification Compliance Report where you can review the assessments for each APC4 Standard based on your site survey. Use the Progress tab to navigate each section of the report. If a Standard is assessed as Partially Met or Not Met, you will see an orange number which indicates an Issue was found for that standard. Click the orange number or Issues tab to view each Issue.
Each Issue will include a Findings statement summarizing why the standard was unmet, and a Standard Requirement which states requirements to demonstrate compliance with the standard during the post-survey process. Use the information from each Issue to populate your practice’s Action Plan document. You will need to write a plan to address each Standard Requirement.

**Exporting the Certification Compliance Report (CCR)**

To export a copy of the CCR, click Report, and then click Export. You can save the file and share with others as needed.
Upload Action Plan
Submit your completed Action Plan within 10 days of CCR receipt. Choose the Organization Representative Persona after log in. Select the most recent Application. From Upload Action Plan tile, click Upload button to upload the completed Action Plan.

Mark as complete after you upload the document. APC4 Staff will review your submitted Action Plan and provide approval or feedback via email within 5 business days.

Document Implementation of Action Plan
Upload documentation demonstrating implementation of the Action Plan by your final due date (120 days from report delivery date). Login and click the Issues tab.
Please click on each Issue and type a Resolution statement summarizing the work completed and upload any related documents to the “Resolution Documents” area.

Important Note: The Certification Portal is not configured to store, receive, display, or otherwise contain PHI and is not a HIPAA-compliant environment. You will be required to attest that any document or file that You upload does not contain PHI. As such, please ensure that any documentation that You upload does not contain any PHI, does not display health information on a patient, and does not contain any personal identifiers of a patient (including, patient names or initials, MRNs, dates of birth, visit dates, or other personally identifying information). If you are unsure whether a document contains PHI, please check with your practice’s privacy officer.

When all documents have been uploaded to support each standard, please click “Submit” for each Issue.
Navigate back to the Applications tab. Click the Document Implementation of Action Plan activity. Review the confirmation language and click confirm to notify staff that you completed upload of all documents. Staff will review all documentation (typically within 4-6 weeks of submission) and reach out with any questions or feedback. If all Standards are assessed as Met following staff and committee review, certification will be granted.

Certification Decision
Certification is awarded when a practice is deemed to have met all requirements for Certification. Practices awarded certification will receive an email announcement. The email will contain a media kit, which includes logo files, a brand guide for how to use the logos and samples of social media posts, press releases, and newsletters.

Contact Us
For all questions about APC4 Certification please reach out to patientcenteredcare@asco.org and we will be happy to assist you.