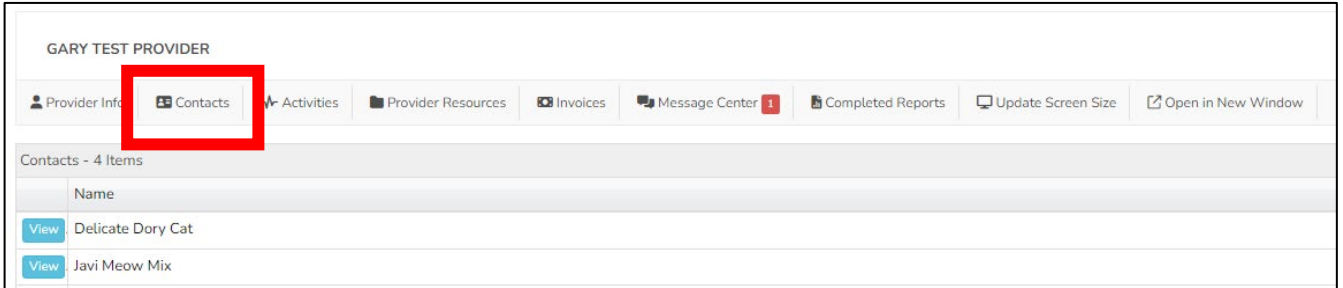


Accountable Contact Designation and Completion of Benchmarking Report

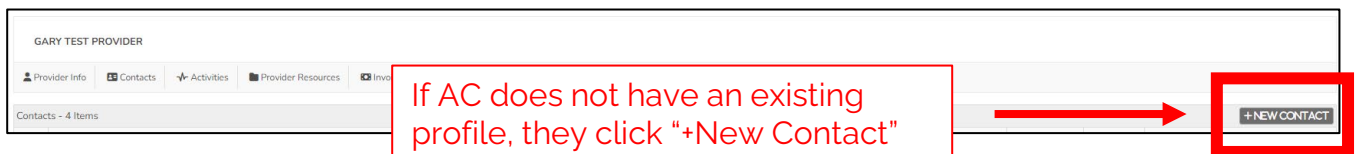
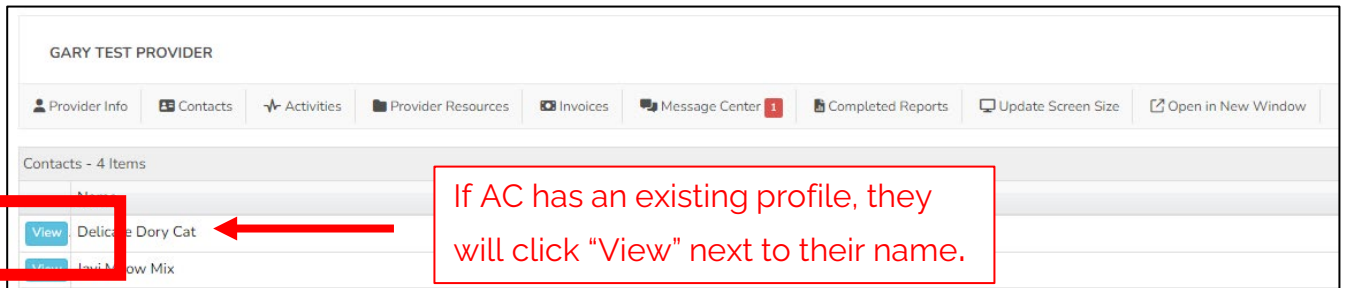
Each Accountable Contact (AC) must complete Accountable Contact Training and attest to an understanding of policies.

Steps:

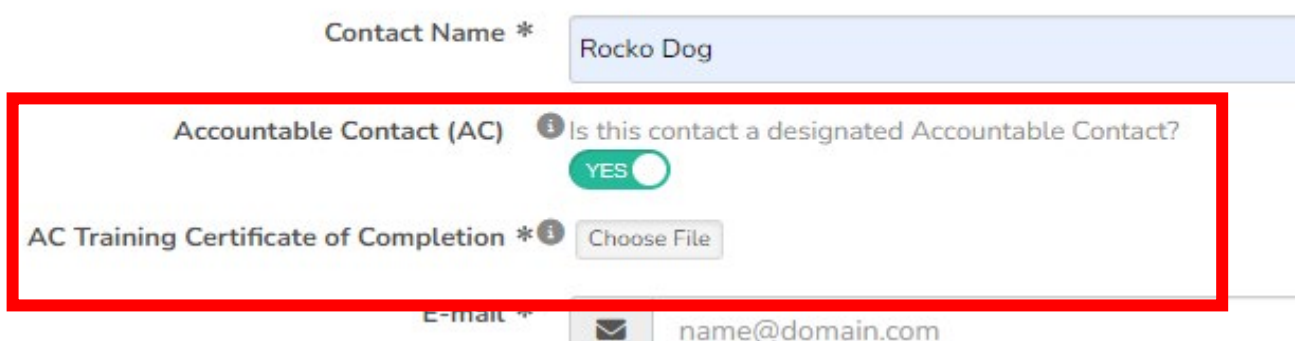
1. AC will log into the CDR CPE Provider Portal and click on the Contacts tab.



2. AC will either click "View" (if they have an existing profile) or "+New Contact" (to create a new profile).



3. AC will edit or add contact information, toggle Accountable Contact (AC) to yes, and upload their Accountable Contact Training Certificate of Completion.



A screenshot of the contact form. The 'Contact Name' field contains 'Rocko Dog'. Below it, the 'Accountable Contact (AC)' field is a toggle switch set to 'YES', with the text 'Is this contact a designated Accountable Contact?' next to it. Below that, the 'AC Training Certificate of Completion' field has a 'Choose File' button. The 'E-mail' field contains 'name@domain.com'. A red box highlights the 'Accountable Contact (AC)' and 'AC Training Certificate of Completion' fields.

Accountable Contact Designation and Completion of Benchmarking Report

4. AC will click "Save Contact".

The screenshot shows a web form for adding a contact. The fields are as follows:

- Contact Name *: Dory Dory Cat
- Accountable Contact (AC) ⁱ Is this contact a designated Accountable Contact? YES
- AC Training Certificate of Completion * ⁱ Choose File
 - TEST.pdf (Size: 28 kb 100%)
- E-mail *: dorycat@dorycat.dorycat
- Phone *: 111-111-1111
- Address1: Address 1 Example
- Address2: Address 2 Example
- Address3: (empty)
- City: City Example
- State: Illinois
- Zip/Postal Code: 11111
- Country: United States

A red rectangular box highlights the "Save Contact" button at the bottom center of the form.

5. AC will allow 48 hours processing time for approval of Accountable Contact status.
6. AC will click on "Benchmarking Report" in the blue banner at the top of the screen.

The screenshot shows a blue banner with the following text:

Provider Status: Prior - Approval Only

Important: One Accountable Contact per account must submit a Benchmarking Report before Providers can submit CPE under the new CDR CPEU Prior Approval Program (goes into effect April 1, 2024).
[Download sample CPE certificate](#)
[Click here for instructions on how to complete the certificate](#)

A red rectangular box highlights the "Benchmarking Report" link in the text.

Below the banner, the user's name "GARY TEST PROVIDER" and a navigation menu are visible.

7. AC will complete the report and click "Save" at the bottom of the screen.

The screenshot shows a form footer with the following elements:

- After Saving, Go To: Record Detail Page
- Save and Cancel buttons

A red rectangular box highlights the "Save" button.