

MyIntealth™ Entity User Guide

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1 Access the MyIntealth Entity Portal

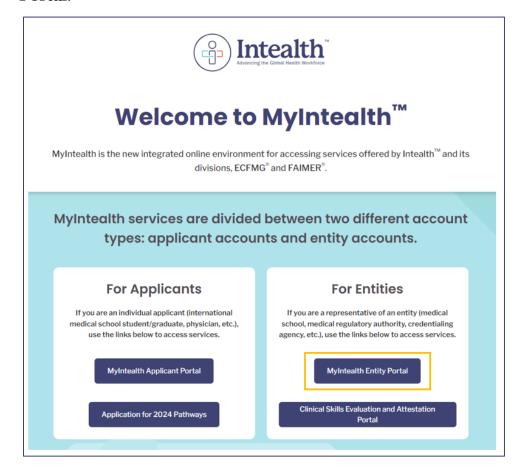
1.1 Establish New Entity and Authorized User Account(s)

If your organization does not already work with Intealth and you are interested in using Intealth services such as **Credentials Verification**, **Enrollment Verification**, or **Certification Verification Service (CVS)**, please contact us at <a href="mailto:enrollment-enrollment

If your organization already uses Intealth services and you were an authorized User of ECFMG's former Online services, please refer to the <u>Access MyIntealth Account for an Authorized User of ECFMG's Former Online Services</u> section below on how to access your account.

1.2 Access MyIntealth Account for an Authorized User of ECFMG's Former Online Services

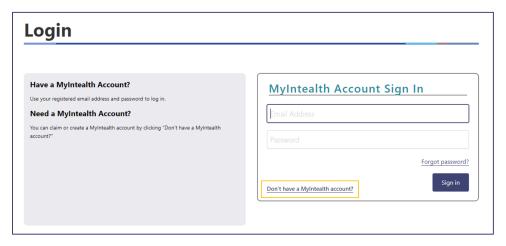
Step 1. Access the **MyIntealth** login page at <u>www.myintealth.app</u>, and click **MyIntealth Entity Portal**.



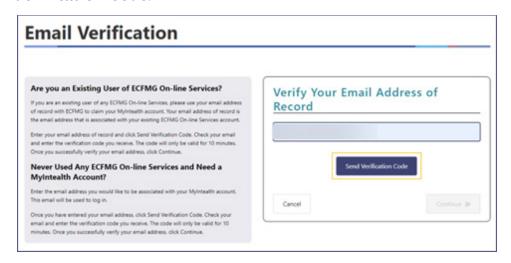
Step 2. Click Access MyIntealth.



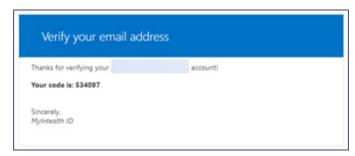
Step 3. Click Don't have a MyIntealth account?



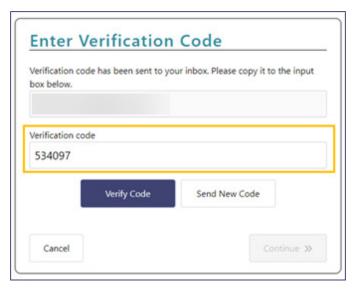
Step 4. Provide the previously used email address within the ECFMG online services, and click **Send Verification Code**.



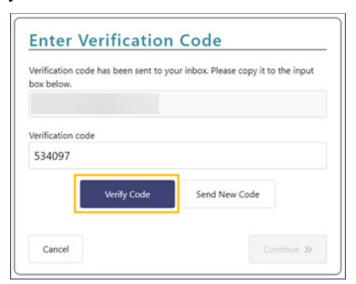
Step 5. The **Verification Code** is sent to the assigned email address.



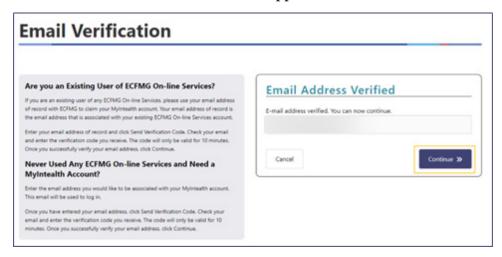
Step 6. Return to the **Email Verification** screen, and enter the provided **Verification Code**.



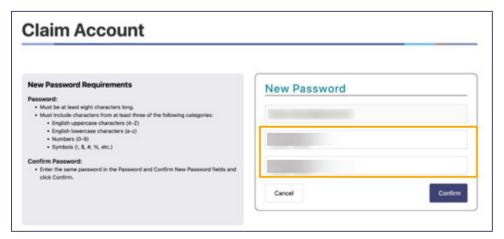
Step 7. Click Verify Code.



Step 8. The **Email Address Verified** section appears. Click **Continue**.



Step 9. Create and confirm a new password on the **Claim Account** screen.



- a. Password requirements when claiming an account:
 - (1) Must be at least eight characters long.
 - (2) Must include characters from at least three of the following categories:
 - 1. Latin uppercase characters (A-Z)
 - 2. Latin lowercase characters (a-z)
 - 3. Numbers (0-9)
 - 4. Symbols (!, \$, #, %, etc.)

 $You \, are \, only \, required \, to \, create \, and \, confirm \, a \, new \, password \, on \, your first \, login.$

Step 10. Click Confirm.



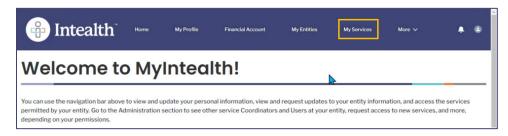
Step 11. Access the MyIntealth Entity Portal.

2 Enrollment Verification

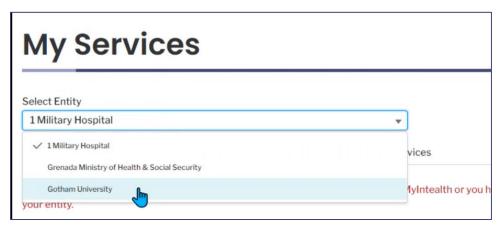
2.1 Complete an Enrollment Verification Request

The following information is specific to Entities that verify student enrollment electronically.

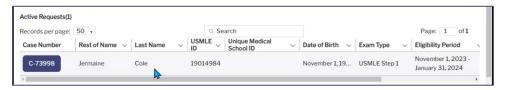
Step 1. From the **MyIntealth Entity Portal**, in the top banner, click **My Services**.



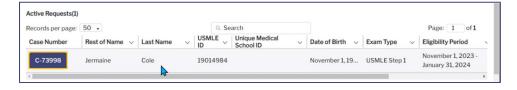
Step 2. On the **My Services** page, choose the school from the **Select Entity** drop-down menu.



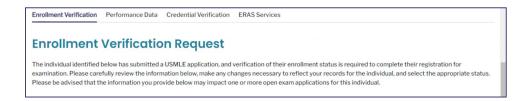
Step 3. Scroll to the **Active Requests** section.



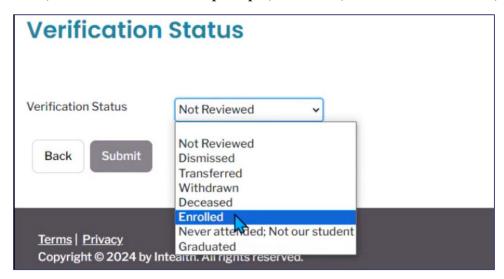
Step 4. Click **Case Number** for the case being reviewed.



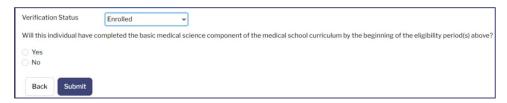
Step 5. The **Enrollment Verification Request** page appears with details about the case. Review this information for accuracy.



Step 6. At the bottom of the page, select the appropriate **Verification Status** from the drop-down menu, and follow the onscreen prompts; otherwise, to confirm enrollment, select **Enrolled**.



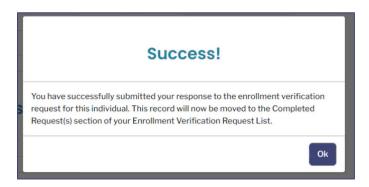
Step 7. An additional question about the school's basic science curriculum appears. Select **Yes** or **No**.



Step 8. Click Submit.



Step 9. A **Success!** Notification appears indicating that you responded to the enrollment verification request.



Step 10. On the **My Services** page, the original request is no longer listed under **Active Requests**.



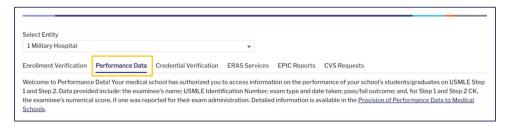
3 Performance Data

3.1 Access USMLE Performance Data

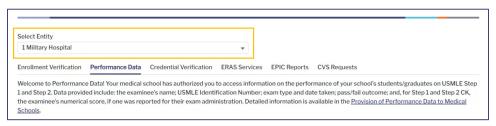
Step 1. Log in to the MyIntealth Entity Portal. In the top banner, click My Services.



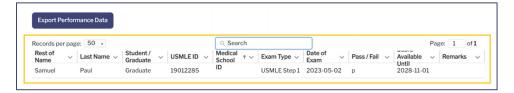
Step 2. Click the **Performance Data** tab.



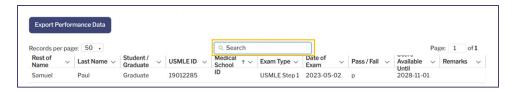
a. If your account is affiliated with more than one school, utilize the **Select Entity** drop-down menu to review results from the appropriate entity.



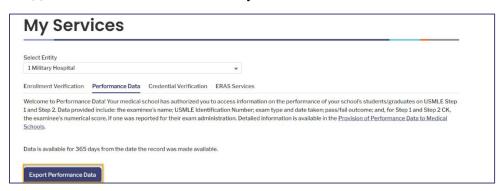
Step 3. You can now view the performance of students/graduates affiliated with that **Entity**.

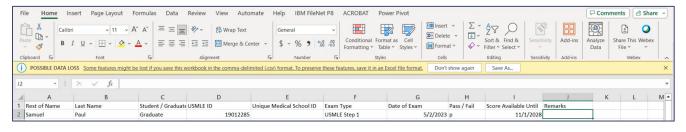


a. To help find a specific applicant's records, utilize the **Search** function.



- b. You may also **Export Performance Data**. The fields within this data are the same fields within the list view on the **MyIntealth Entity Portal**.
 - (1) A .csv file will download to your local drive.





4 Credentials Verification

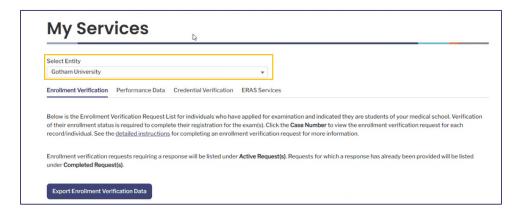
4.1 Complete a Credential Verification Request

Step 1. From the **MyIntealth Entity Portal**, in the top banner, click **My Services**.

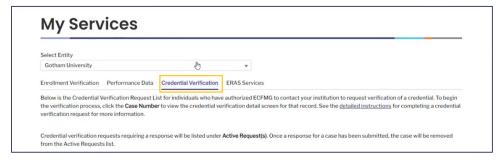


Step 2. The **My Services** page opens. Select your entity from the **Select Entity** drop-down menu.

Note: If your entity is associated with only one school, the **Select Entity** drop-down menu defaults to that school.



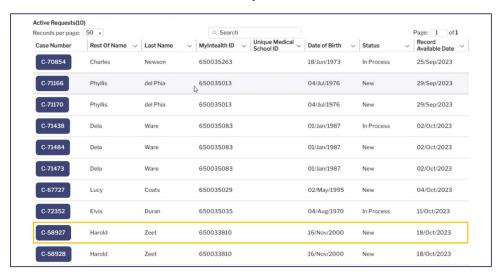
Step 3. Click the **Credential Verification** tab.



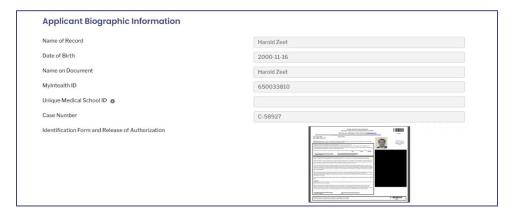
Step 4. Scroll to see all credentials to be verified.



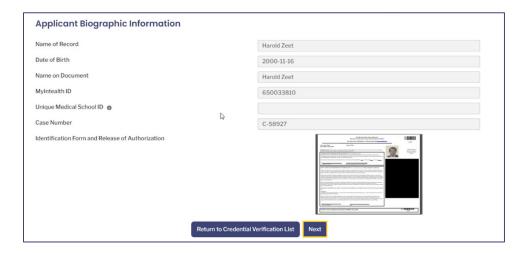
Step 5. Click the **Case Number** for the case you want to work on.



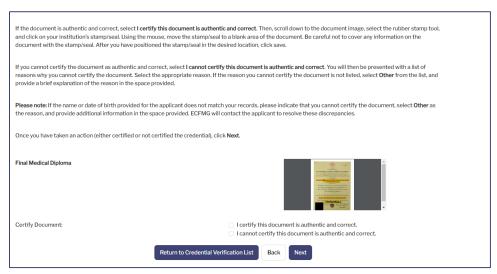
Step 6. The **Applicant Biographic Information** appears. Click the thumbnail of the attached **Identification Form** to view a larger version of the document.



Step 7. Review the Applicant Biographic Information, and click Next.



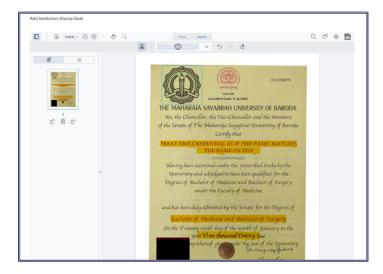
Step 8. The **Verify Credential** page appears. Click the thumbnail of the attached document to view a larger version of the document.



Step 9. Within the **Certify Document** section, select the appropriate option to continue.



a. If the document is authentic and correct, click the **I certify this document is** authentic and correct option. A PDF version of the document appears in the **Add Institution Stamp/Seal** section. Continue with <u>Step 10</u>.



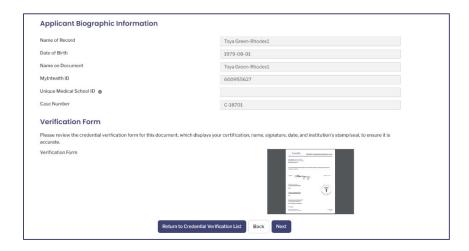
- b. If you cannot certify that the document is authentic and correct, click the **I cannot certify this document is authentic and correct** option.
 - (1) Select your reason for not certifying from the drop-down menu.



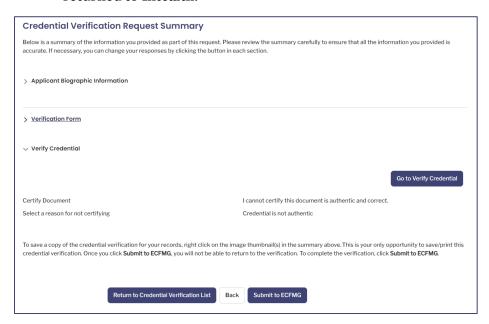
(2) Click Next.



(3) The completed **Verification Form** appears. Click **Next**.



(4) Click **Submit to ECFMG**. This process is now complete, and your response is returned to Intealth.



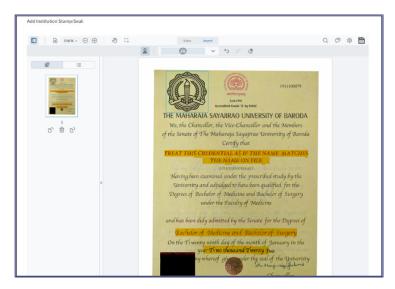
Step 10. In the **Add Institution Stamp/Seal** section, click **Insert**.



Step 11. Below the **Insert** button, click the picture of the stamp.



Step 12. Move your cursor to the desired section of the document, and click once to place it within the document.



Step 13. Once placed, the stamp shows affix details below the image.



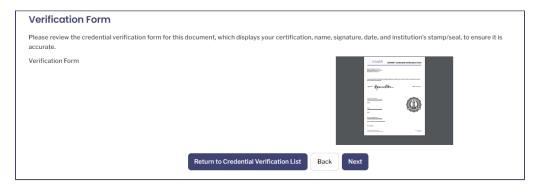
Step 14. Click **Save** (disk icon) at the top right corner of the PDF. A **Success** notification appears to inform you that the updates have been saved.



Step 15. Now that the document has been certified and saved with a stamp, click **Next** at the bottom of the page.



Step 16. The **Applicant Biographic Information** appears again. This information now includes a generated **Verification Form**. Click the thumbnail of the attached **Verification Form** to view a larger version of the document.



Step 17. Review the **Verification Form** information. This form was generated using information already in the system (e.g., the **Signature** was uploaded by Intealth's Medical Education Resource [MER] department).



Step 18. Click Next.



Step 19. The **Credential Verification Request Summary** section appears.

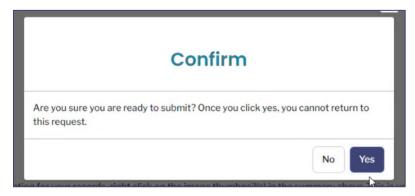
Credential Verification Request Summary

Below is a summary of the information you provided as part of this request. Please review the summary carefully to ensure that all the information you provided is accurate. If necessary, you can change your responses by clicking the button in each section.

Step 20. Click **Submit to ECFMG** at the bottom of the page.



Step 21. A **Confirm** pop-up appears. Click **Yes** to continue.

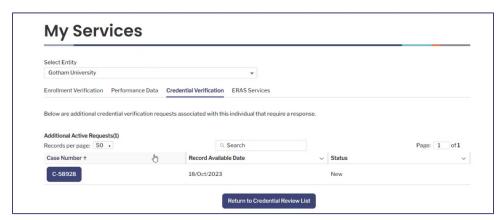


Step 22. A **Success** notification appears confirming that the credential verification request is submitted.

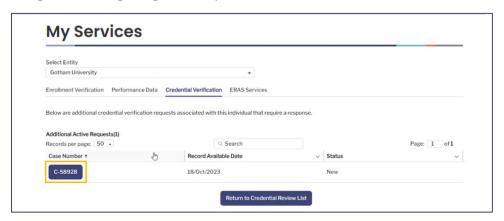


Step 23. The **My Services** page appears.

a. If the applicant has two cases that require a response (e.g., a Final Medical Diploma and Final Medical School Transcript), MyIntealth automatically takes you to the case associated with that applicant. This is done automatically so the applicant's entire packet can be completed at the same time.

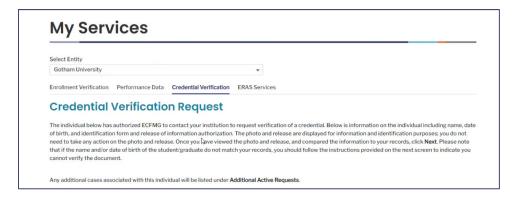


Step 24. If there are **Additional Active Requests**, click the corresponding **Case Number**. Complete the steps as previously shown.

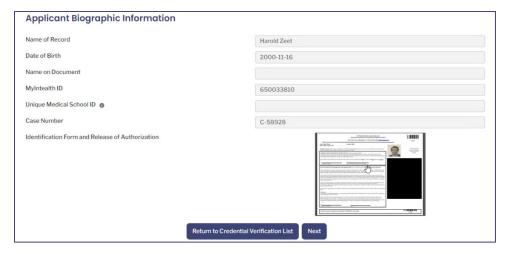


4.2 Upload and Certify the Authenticity of a Requested Credential

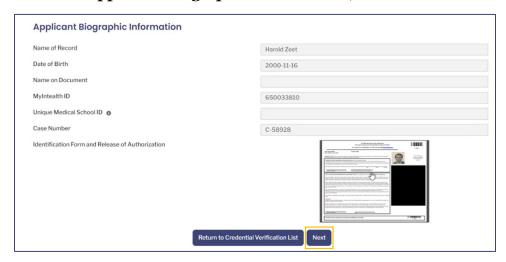
This section addresses responding to a **Credential Verification Request** submitted by an Intealth specialist. If a **Credential Verification Request** page appears, that indicates that an Intealth specialist has requested a copy of a document from your school.



Step 1. The **Applicant Biographic Information** appears. Click the thumbnail of the attached **Identification Form** to view a larger version of the document.



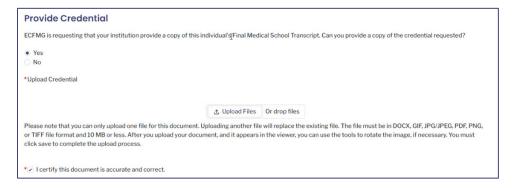
Step 2. Review the **Applicant Biographic Information**, and click **Next**.



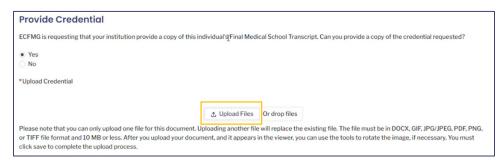
Step 3. The **Upload and Verify Credential** page appears. This page requests that you (the Entity) provide the credential.



Step 4. In the **Provide Credential** section, select **Yes**.



Step 5. Click Upload Files.



Step 6. Select the file to upload. It appears on-screen. Review the document, and click **Save** (disk icon).



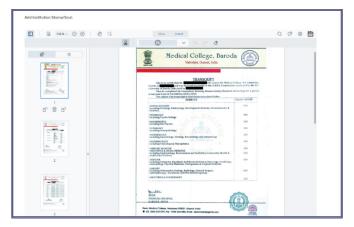
Step 7. A **Success** notification appears indicating that the file has been successfully uploaded.



Step 8. Click the I certify this document is authentic and correct checkbox.



Step 9. A PDF version of the document appears in the **Add Institution Stamp/Seal** section. This section is where you insert the stamp certifying the document.



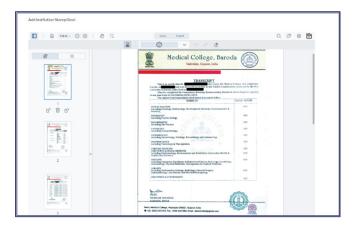
Step 10. In the **Add Institution Stamp/Seal** section, click **Insert**.



Step 11. Below the **Insert** button, click the picture of the stamp.



Step 12. Move the stamp to the appropriate section of the document, and click once to place it on the document.



Step 13. The stamp shows affixed details below the image.



Step 14. Click **Save** (disk icon) at the top right corner of the PDF. A **Success** notification appears indicating that the updates are saved.



Step 15. If additional documents need to be added, click **Add Supporting Documentation**, and follow the on-screen instructions to add those documents.



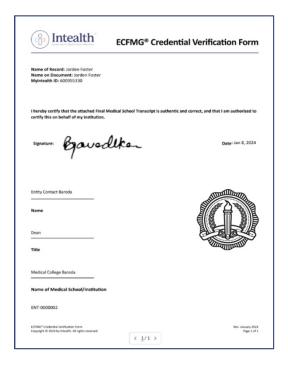
Step 16. Now that you certified and saved the document with a stamp and added any supporting documentation, click **Next** at the bottom of the screen.



Step 17. The **Applicant Biographic Information** appears again. This information now includes a generated **Verification Form**. Click the thumbnail of the attached **Verification Form** to view a larger version of the document.



Step 18. Review the **Verification Form**. This form was generated using information already in the system (e.g., the **Signature** was uploaded by the MyIntealth Medical Education Resource [MER] department).



Step 19. Click Next.



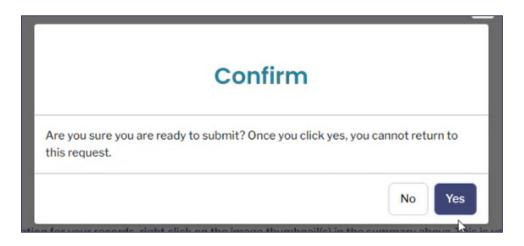
Step 20. The Credential Verification Request Summary appears.



Step 21. Click **Submit to ECFMG** at the bottom of the page.



Step 22. A Confirm pop-up appears. Click Yes to continue.



Step 23. A **Success** notification appears confirming that the credential verification request was submitted.

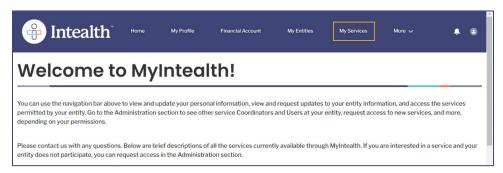


5 Electronic Residency Application Service (ERAS)

5.1 Credential Uploads and Reuploads for ERAS

5.1.1 Credential Uploads for ERAS

Step 1. From the MyIntealth Entity Portal homepage, in the top banner, click My Services.



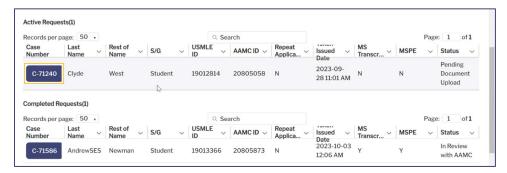
Step 2. Click the **ERAS Services** tab.

My Services			
Select Entity St. George's University School of Medicine	•		
Enrollment Verification Performance Data Credential Verification	ERAS Services		
Home ERAS Requests Reupload Requests			

Step 3. Under the **ERAS Services** tab, click **ERAS Requests**.



Step 4. Click the **Case Number** under the **Active Requests** section.

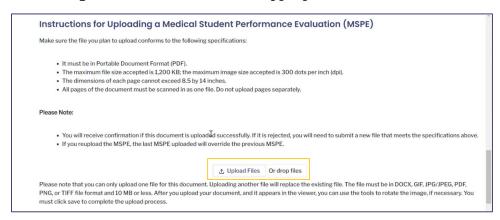


a. When an applicant completes the process for purchasing and registering their Token, they appear in the **Active Requests** section.

- b. The **Status** of that request is **Pending Document Upload**.
- Step 5. Review the information in the Case Details. Select an Asset Type from the drop-down menu.



- a. There are two main **Asset Types**: **Medical School Performance Evaluation** (MSPE) and the **Final Medical School Transcript**.
- b. Both documents must be uploaded by using the following steps.
- Step 6. Select Medical School Performance Evaluation, and scroll down to the Instructions for Uploading a Medical Student Performance Evaluation (MSPE) section. Use the following instructions to upload the MSPE.
 - a. Click **Upload Files**, and select the appropriate file.



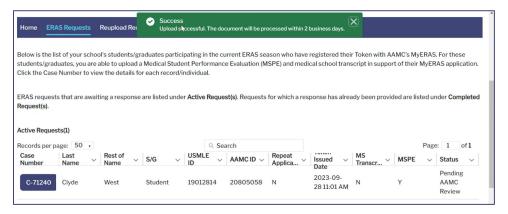
b. A preview of the file appears. Click **Save** (disk icon).



- c. A success notification appears stating that the file has been uploaded. A preview of the document also shows under the **Upload Files** button.
- Step 7. Click Submit.



Step 8. A Success notification appears stating that the document has been uploaded, and the Status of the Active Request is now listed as Pending AAMC Review.

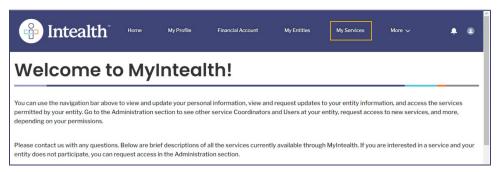


Step 9. Repeat the previous instructions starting at <u>Step 5</u> to upload the **Final Medical School Transcript**.

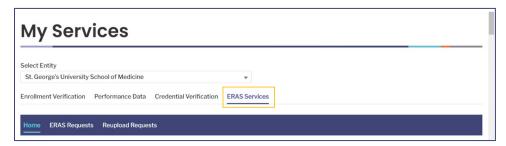


Note: The **MSPE** row is listed as **Yes**, which means that document has already been uploaded. The **Transcript** section is listed as **No**, which means that the transcript still needs to be uploaded.

- **Step 10.** The request now appears under the **Completed Requests** section on the **ERAS Requests** page.
- 5.1.2 Credential Reupload Requests for ERAS
 - **Step 1.** From the **MyIntealth Entity Portal** homepage, in the top banner, click **My Services**.



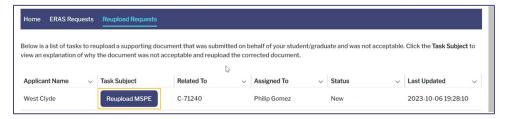
Step 2. Click the **ERAS Services** tab.



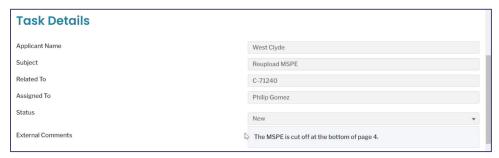
Step 3. Under the **ERAS Services** tab, click **Reupload Requests**.



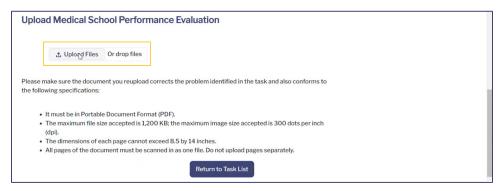
Step 4. Click **Reupload** under the **Task Subject** for a specific **Reupload Request**.



Step 5. Review the **Task Details** section. Scroll to the **Upload Medical School Performance Evaluation** section, and use the following instructions to reupload the file.



a. Click **Upload Files**, and select a file.



b. A preview of the file appears. Click the **Save** (disk icon) button.



c. A success notification appears indicating that the file has been uploaded. A preview of the document also now appears under the **Upload Files** button.

Step 6. Click Reupload.



Step 7. The task is removed from the **Reupload Requests** list, and the file has been sent to Intealth.

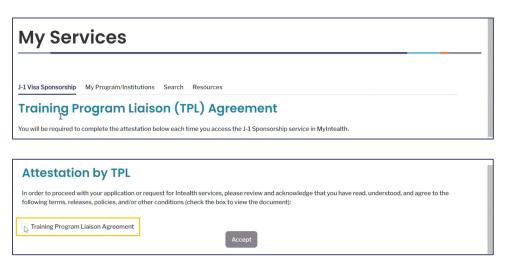
6 J-1 Visa Sponsorship (Training Program Liaison)

6.1 Add an Appointment Profile

From the MyIntealth Entity Portal, in the top banner, click My Services. Step 1.



The My Services page opens. Click the Training Program Liaison (TPL) Agreement Step 2. checkbox in the **Attestation by TPL** section.



The Training Program Liaison Agreement pop-up appears. Review the information, Step 3. and click Accept.



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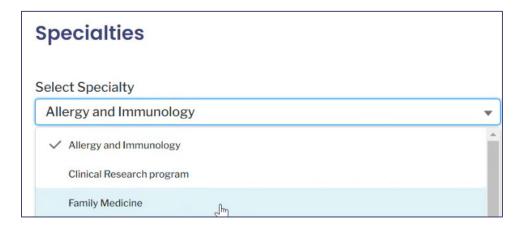
Step 4. Click **Accept** at the bottom of the page.



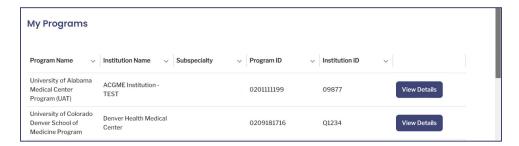
Step 5. The **My Program/Institutions** section appears.



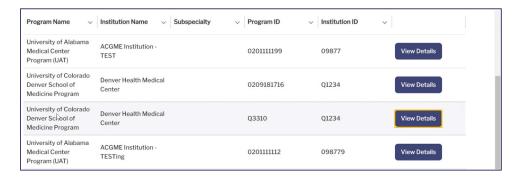
Step 6. Select the appropriate **Specialty** from the drop-down menu.



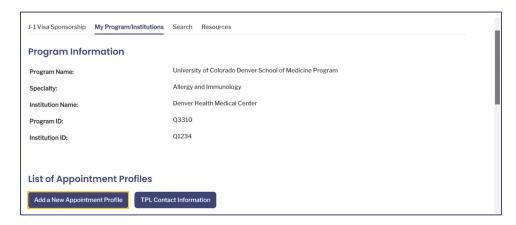
Step 7. The list of **My Programs** associated with that **Specialty** appears below.



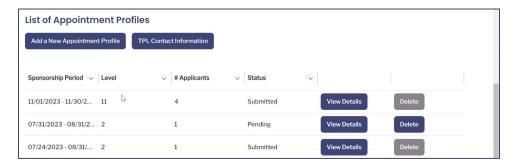
Step 8. Click the **View Details** button associated with the program creating the **Appointment Profile**.



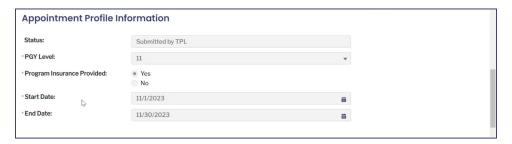
Step 9. The Program Information page appears. Click Add a New Appointment Profile.



a. Scroll to the **List of Appointment Profiles** section to view a full list of existing Appointment Profiles.



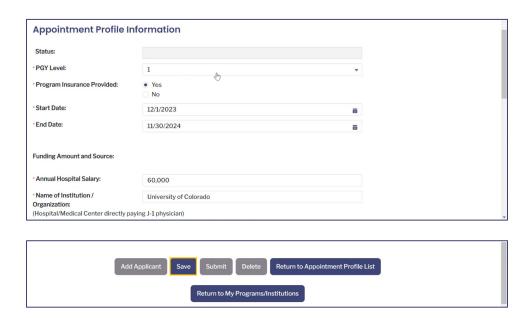
b. Click **View Details** to see additional information for a particular profile. The **Appointment Profile Information** for that profile appears showing information such as: Status, PGY Level, Start and End Date, applicants in that profile, and more.



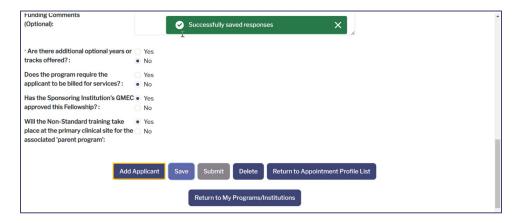
Step 10. A blank Appointment Profile Information page opens. Enter the required information

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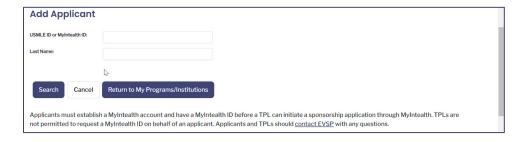
(*) and click **Save**.



Step 11. A **Successfully saved** notification appears at the top of the screen. Click **Add Applicant**.



Step 12. The **Add Applicant** page appears. Use the following steps to add an applicant.



- a. Enter the **USMLE ID** or **MyIntealth ID** of the applicant.
- b. Enter the **Last Name** of the applicant.
- c. Click Search.

Add Applicant		
USMLE ID or MyIntealth ID:	650034423	1
Last Name:	King	ı
Search Cancel	Return to My Programs/Institutions	
Applicants must establish a MyIntealth account and have a MyIntealth ID before a TPL can initiate a sponsorship application through MyIntealth. TPLs are not permitted to request a MyIntealth ID on behalf of an applicant. Applicants and TPLs should contact EVSP with any questions.		

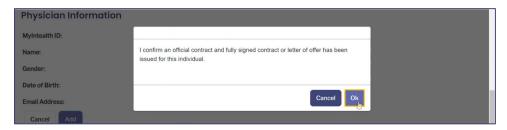
d. The **Search Results** appear. Click the appropriate applicant's name to continue.



e. A Summary of the program, Applicant Profile, and Physician Information appears. Click **Add** to add the applicant to the appointment profile.



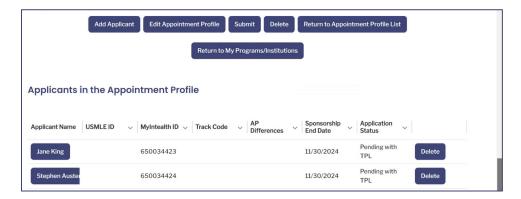
f. A confirmation pop-up appears asking whether an official contract and fully signed contract or letter of offer has been issued for this individual. If so, click **Ok**.



Step 13. The Applicant Profile page appears again. Scroll to the **Applicants in the Appointment Profile** section to review the recently added applicant.



Step 14. The **Application Status** is **Pending with TPL**. Add more applicants to the **Appointment Profile** by repeating **Step 11**.



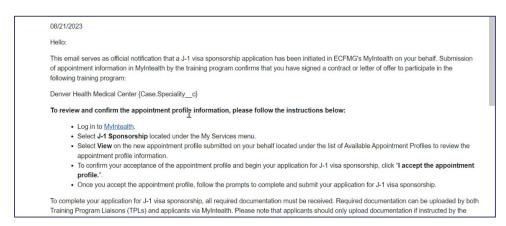
Step 15. Once you have added all applicants to the **Appointment Profile**, click **Submit**.



Step 16. The **Applicants in the Appointment Profile** section shows an **Application Status** of **Pending with Physician**.

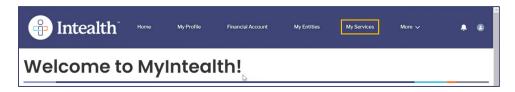


Step 17. At this point, an email is sent to the applicant informing them that a J-1 Visa Sponsorship Application has been initiated on their behalf.

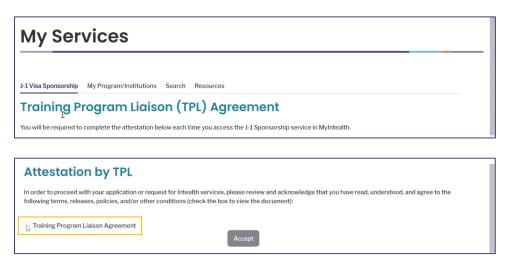


6.2 View an Uploaded J-1 Document Status

Step 1. From the **MyIntealth Entity Portal**, in the top banner, click **My Services**.



Step 2. The My Services page opens. Click the Training Program Liaison (TPL) Agreement checkbox in the Attestation by TPL section.



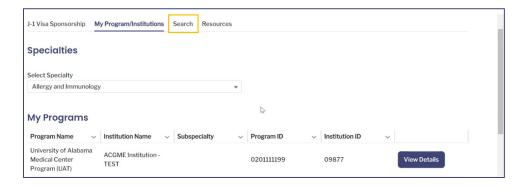
Step 3. The **Training Program Liaison Agreement** pop-up appears. Review the information, and click **Accept**.



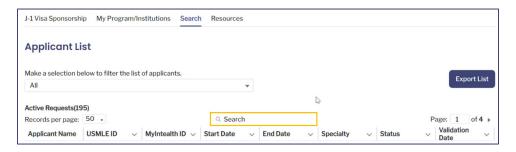
Step 4. Click **Accept** at the bottom of the page.



Step 5. The **My Program/Institutions** page appears. To quickly find the case you are looking for, click **Search**.



Step 6. Under the **Applicant List**, use the search bar to find the applicant.



Step 7. Click the **Applicant Name**.



Step 8. The applicant's page opens. This page includes **Profile Information** and **Applicant Information** sections. Click **View and Upload Documents** at the bottom of the page.

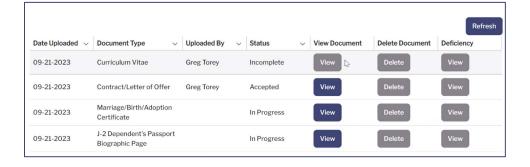




Step 9. Scroll to the top of the page and click **View Documents**.



Step 10. The list of documents associated with the applicant appears.



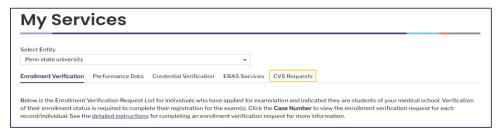
7 Certification Verification Service (CVS)

7.1 Submit New CVS Requests

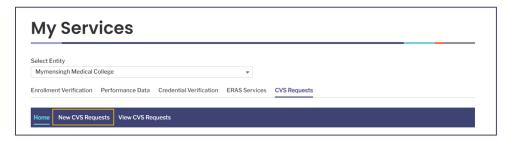
Step 1. Log in to the **MyIntealth Entity Portal**. In the top banner, click **My Services**.



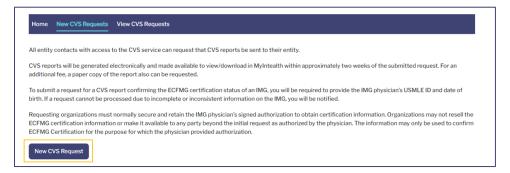
Step 2. Click the **CVS Requests** tab.



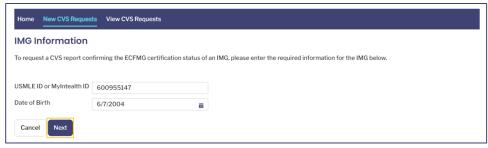
Step 3. Click the New CVS Requests tab in the blue banner.



Step 4. Click the **New CVS Request** button at the bottom of the screen.



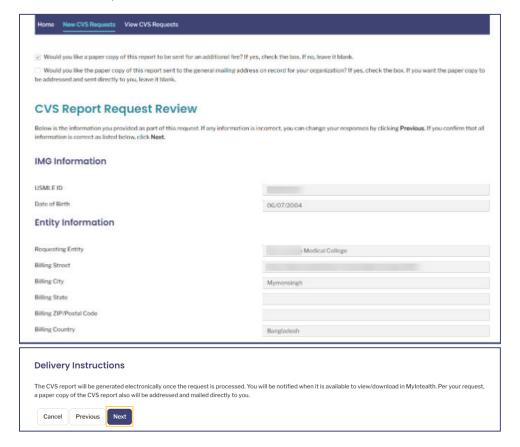
Step 5. In the **IMG Information** section, enter the **USMLE ID or MyIntealth ID** and **Date of Birth**.



Step 6. Click Next.

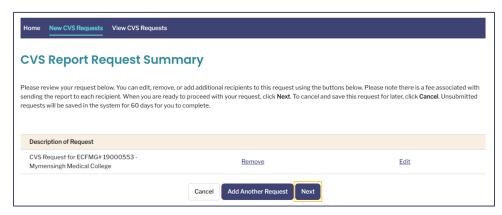


Step 7. Review the information in the CVS Report Request Review section. Under the Delivery Instructions, click Next.

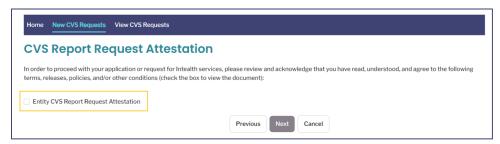


a. This page has the option to also request a paper copy of this report.

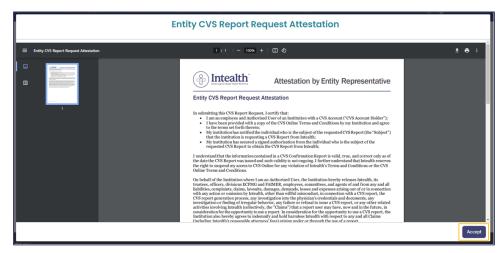
Step 8. The request is now available for review on the CVS Status Report Request Summary page. Once ready, click Next.



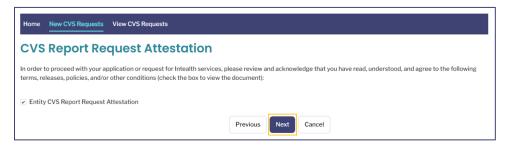
- a. From this page, you can Remove or Edit the current request, as well as Add Another Request.
- **Step 9.** Review the **CVS Report Request Attestation** section, and click the checkbox.



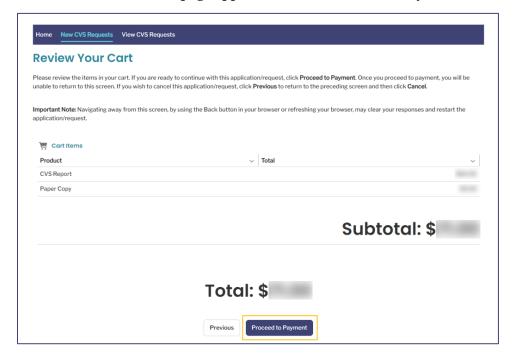
Step 10. The **Entity CVS Report Request Attestation** pop-up appears. Review the information and click **Accept**.



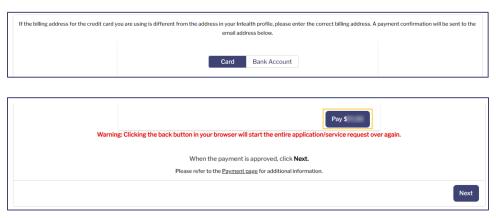
Step 11. Click Next.



Step 12. The Review Your Cart page appears. Click Proceed to Payment.

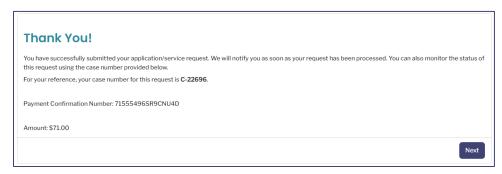


Step 13. Complete the subsequent **Billing Address** and **Payment Info** sections and click **Pay**.



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Step 14. A **Thank You!** notification appears with the **Case Number** for your request.

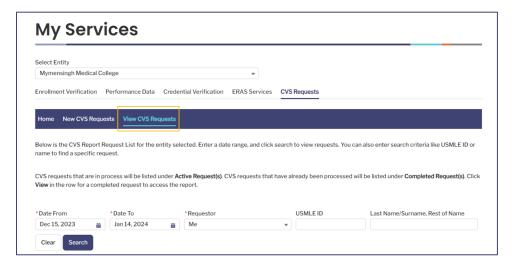


Step 15. Click **Next** to return to the **MyIntealth Entity Portal** home page.



7.2 View CVS Requests

To view your CVS requests, return to My Services, select CVS Requests page and click the View CVS Requests tab.

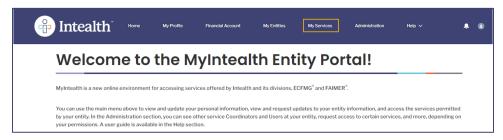


- a. All **Active Requests** are now available for review.
- b. The **Case Status** of the report updates accordingly. For example, once the status is listed as **Report Printed**, it moves from the **Active Requests** section to the **Completed Requests** section.

8 Electronic Portfolio of International Credentials (EPIC)

8.1 View EPIC Notifications

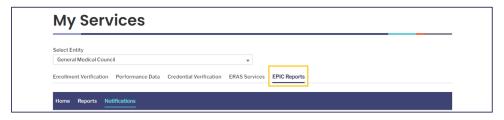
Step 1. From the top banner of the **MyIntealth Entity Portal**, click **My Services**.



Step 2. Select an Entity from the **Select Entity** drop-down menu.



Step 3. Click the **EPIC Reports**.

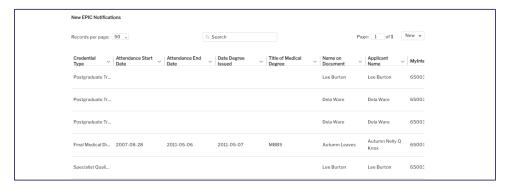


Step 4. Click **Notifications** (in the blue banner).

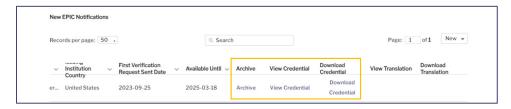


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Step 5. A list of **New EPIC Notifications** displays. Use the following instructions for a breakdown of options related to this page.



a. This list shows details about credential verification cases sent for verification to the issuing institution *with* the entity listed as the automatic EPIC Report recipient. These credentials can be viewed, downloaded, or archived.

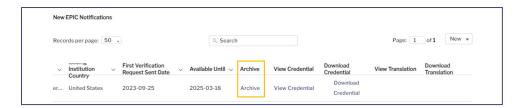


b. Use the drop-down menu on the right side of the page to toggle between **New** and **Archived** lists.



c. Click **Archive** to move a notification from the **New EPIC Notifications** list to the **Archived** list.

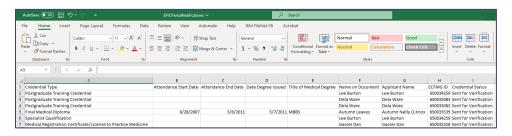
Note: This action can also be undone by clicking Unarchive on the Archived list.



d. Click **Export EPIC Notifications** to export the list of notifications.



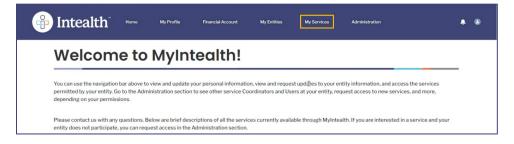
(1) An Excel spreadsheet containing the **EPIC Notifications** list downloads to your local device.



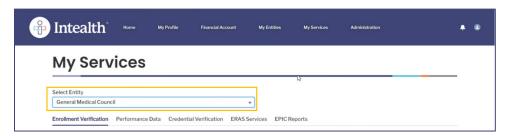
e. **After** the **Credential Verification Case** is accepted and an **EPIC Report** is sent to the **Entity Portal**, the credential is removed from the **EPIC Notification** list.

8.2 Receive an EPIC Report - EPIC Partner Organization

Step 1. From the MyIntealth Entity Portal, in the top banner, click My Services.



Step 2. The **My Services** page opens. **Select an Entity** from the drop-down menu.



Click the **EPIC Reports** tab, then click **Reports**.



A list of **EPIC Reports** sent to the **Entity** appears. These credentials can be viewed, downloaded, and archived.

