

# Getting Access to PECOS

5/2/2024

**Closed Captioning:** *Auto-generated closed captioning is enabled in this course and is at best 70-90% accurate. Words prone to error include specialized terminology, proper names and acronyms.*



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# Today's Presenters

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## Provider Outreach and Education Consultants

- Laura Brown, CPC
- Susan Stafford PMP, COA, AMR



## Agenda

- Benefits of PECOS
- CMS Systems and Relationship
- Retrieve Forgotten User ID
- Create Your Account
- Register as an Authorized Official (AO), Access Manager (AM) or Staff End User for Your Employer
- Initiate a Connection Request to a Provider
- Initiate a Connection Request to a Group/Entity
- Manage Your Employees and Their Access
- Contact Information and Resources

# Benefits of PECOS

# Benefits of PECOS

- Access to provider enrollment information currently on file with Medicare, submitted
  - Electronic via PECOS
  - CMS paper application
- Submit electronic application for any scenario to update, add or delete provider enrollment information with the following features
  - Electronic signatures or upload certification statements
  - Upload supporting documents (PDF or TIFF)

# Benefits of PECOS

- View the following PECOS reports
  - Medicare ID Report (PTAN, Medicare Number)
  - Approved Enrollment Record (view current provider enrollment information)
  - Pending Reassignment Applications
  - Reassignment Report (PTAN, effective date, revalidation due date)



# PECOS Reports

**Existing Enrollments**

Contractor: NATIONAL GOVERNMENT SERVICES, INC.  
State: NEW YORK  
Type/Specialty: CLINIC/GROUP PRACTICE

Enrollment Type: 855B  
Medicare ID: [View Medicare ID Report](#)  
Status: APPROVED [View Approved Enrollment Record](#)

Current ADI Accreditation?: No  
Revalidation Status: Revalidation Due [Sample Revalidation Notice](#)  
Revalidation Due Date: 02/28/2017  
Practice Location: ROCHESTER, NY

Existing Reassignments: 2  
Pending Reassignments Applications: 0  
[View/Manage Reassignments](#)

[VIEW](#)  
[REVALIDATE](#)  
[MORE OPTIONS](#)



# View/Manage Reassignments Report



View/Manage Reassignments

### Pending Reassignments Applications

Pending Reassignments Applications Details					
Name/LBN	NPI	Status	Tracking ID	Action	
Provider	XXXXXXXXXX	PENDING E-SIGNATURES <a href="#">View Pending E-Signatures Application</a>	TXXXXX	<a href="#">MANAGE SIGNATURES</a> <a href="#">CORRECT &amp; RE-SUBMIT</a>	
Provider	XXXXXXXXXX	PENDING E-SIGNATURES <a href="#">View Pending E-Signatures Application</a>	TXXXXX	<a href="#">MANAGE SIGNATURES</a> <a href="#">CORRECT &amp; RE-SUBMIT</a>	

### Reassignments Report

Filter Reassignment Records

Please provide one or more of the following options to filter the enrollments. Selecting the reset button will clear the options selected and load the full list of enrollments.

Reassignment Status ?

All Statuses v

Enrollment Status

All Statuses v

Relationship Status

All Relationships v

[FILTER](#) [RESET](#)

Records 1 - 1 of 1

The table below displays Reassignment Information for Approved, Deactivated, Revoked, and Rejected enrollment records. Any changes that you submit will display here only after the Medicare Administrative Contractor has processed the submitted enrollment.

Reassignments Report Details							
Relationship	Provider Name/LBN	NPI	Current Enrollment Status	Medicare ID	Effective Date	Reassignment End Date	Revalidation Due Date
Receiving Benefits from	Provider	XXXXXXXXXX	APPROVED	ptan	05/01/2018	N/A	N/A

Records 1 - 1 of 1

**Note:** Please select on the "Download Report" button to download this report in CSV format.

[PRINT](#) [DOWNLOAD REPORT](#)

[RETURN TO MY ENROLLMENTS](#)
[MANAGE REASSIGNMENTS](#)

# Learn About PECOS

- NGS website
  - Learn About PECOS Web [Part A](#) or [Part B](#)
    - ✓ Links to all three systems, PECOS, I&A, NPPES
- CMS website
  - [Internet-based PECOS](#)
- PECOS website
  - Provider and Supplier Resources
    - ✓ [Enrollment Tutorials](#)
    - ✓ [Accessibility](#)

# CMS Systems and Relationship

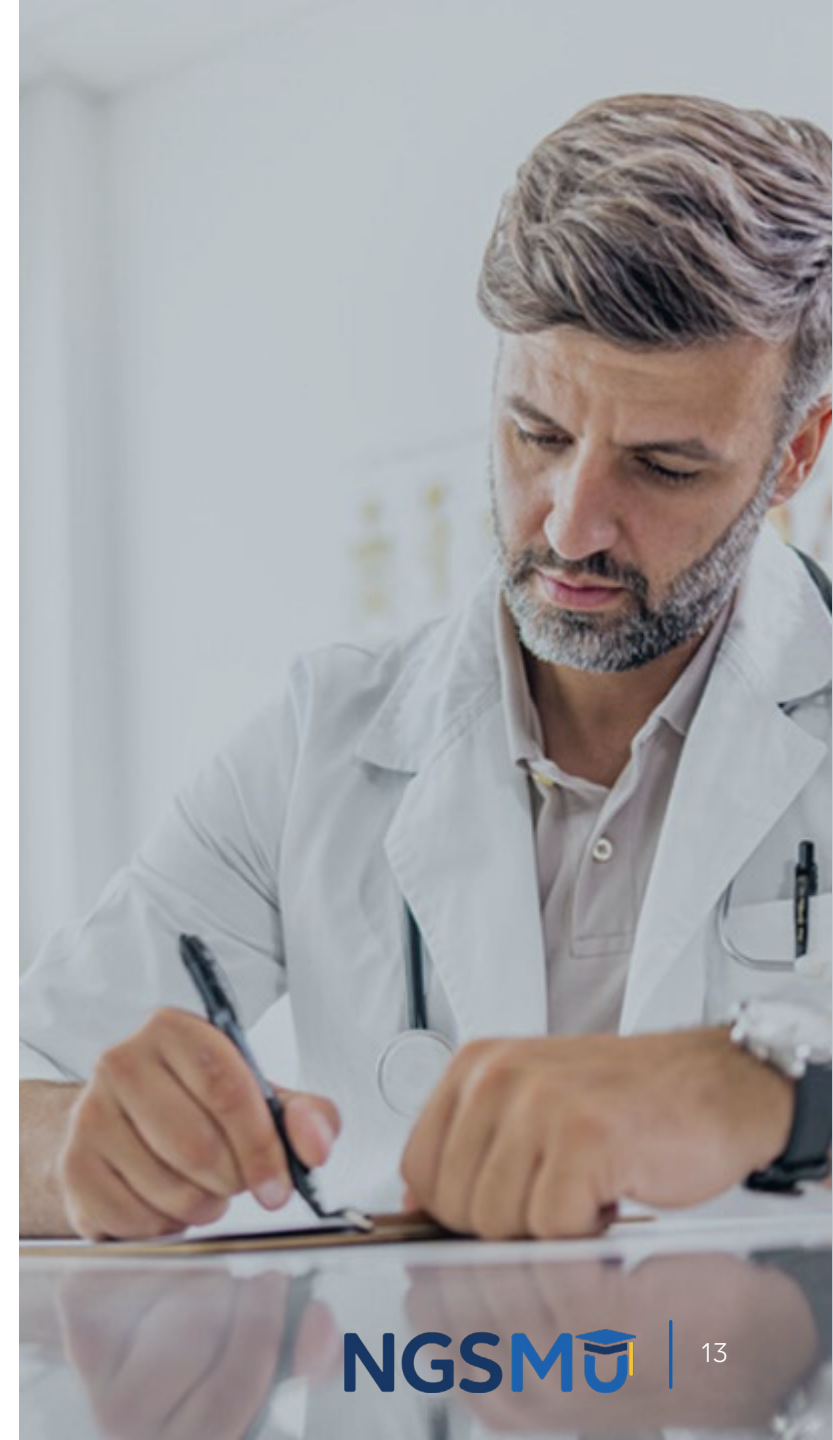


# Identity & Access (I&A) Management System

## Identity & Access (I&A) Management System

Provider  
Enrollment, Chain,  
and Ownership  
System (PECOS)

National Plan &  
Provider  
Enumeration  
System (NPPES)



# Identity & Access Management System

**CMS** Centers for Medicare & Medicaid Services

## Identity & Access Management System [? Help](#)

[EHR Business Function in I&A](#)

Starting October 1, 2023, the Promoting Interoperability Programs (previously known as The Medicare and Medicaid Electronic Health Records (EHR) Incentive Programs) website will be decommissioned and current users will no longer have access to the website. All options to add the EHR business function to staff will be removed in I&A and all pending requests for EHR will be rejected.

Authorized users are able to sign in to the Identity & Access Management System. If you are a new user you must first [register](#).

### Sign In

\* indicates required field(s)

\* **User ID:**

\* **Password:**

**Sign In** ▶

[? Forgot Password](#)

[? Retrieve Forgotten User ID](#)

[? Enter your PIN](#)

### One account to access multiple systems

Create one account with the Identity & Access Management System to manage access to NPPES and PECOS, manage staff, and authorize others to access your information.

**IMPORTANT!** - Every individual user with access to the I&A system is responsible for:

- Keeping login information secure.
- Selecting strong passwords.
- Reporting any unauthorized use of accounts.

Sharing of login information is strictly prohibited!

**Create Account Now** ▶

**PECOS** Use this system to register for Medicare or update your current enrollment information.

**NPPES** Use this system to apply for and manage National Provider Identifiers (NPIs).  
National Plan & Provider Enumeration System

**Quick Reference Guide**  
Overview of features and tools to manage your account.

**Frequently Asked Questions**  
Answers to common questions about registration, who should register, and how to manage your account.

To learn more about Multi-Factor Authentication (MFA) [click here](#)

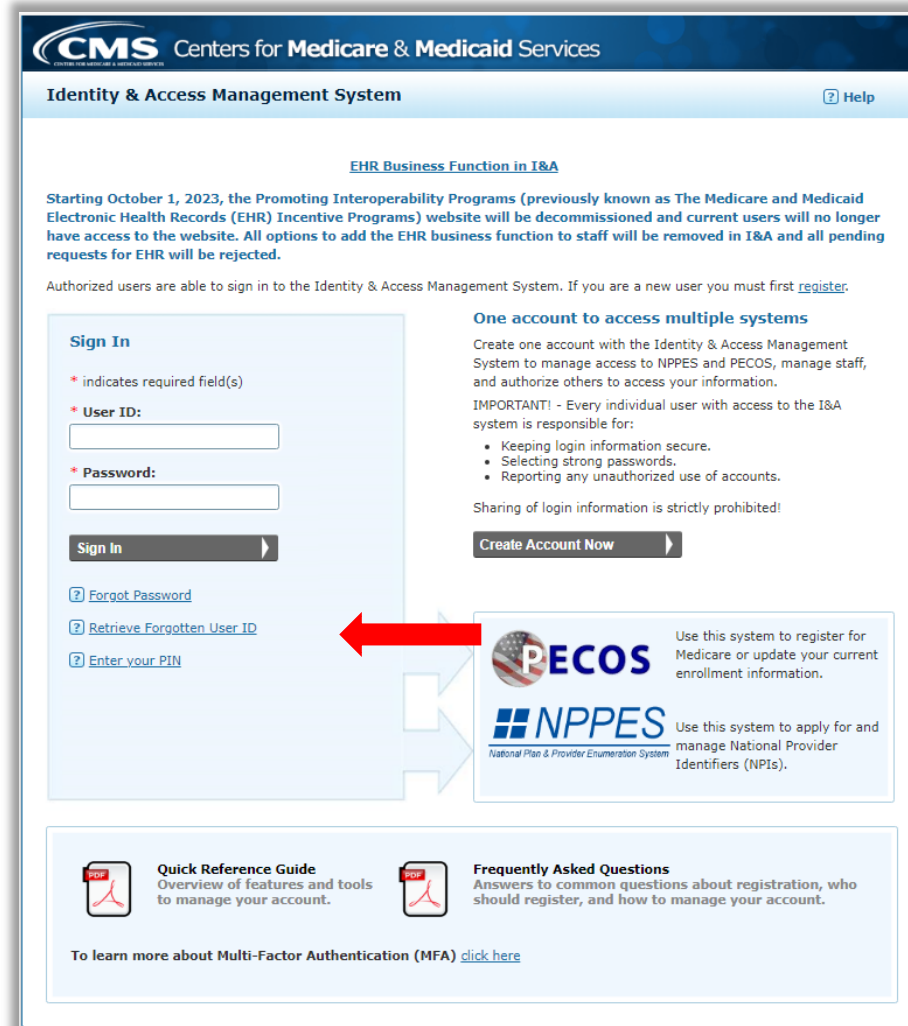
# I&A Management System

- Purpose for I&A security system
  - Individual profile for user ID to access multiple systems
    - ✓ [PECOS](#) (Medicare provider enrollment information)
    - ✓ [NPPES](#) (NPI information)
  - Connection to organization and individual enrollments
  - Authorize and manage staffs access to enrollment information

Retrieve Forgotten User ID



# Retrieve Forgotten User ID



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Identity & Access Management System [Help](#)

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# Retrieve Forgotten User ID - Information

**CMS** Centers for Medicare & Medicaid Services

Identity & Access Management System [Help](#)

Retrieve Forgotten User ID - Information [Back to Previous Page](#)

**Note:** You have two options for retrieving your User ID.

1. To have your User ID e-mailed to you, enter an e-mail address associated with your account.
2. To have your User ID immediately displayed to you, enter the User Information associated with your account.

If you choose to receive your User ID by e-mail and do not receive the e-mail within 24 hours, please return to this page and enter the User Information associated with your account.

\* indicates required field(s)

**E-mail Information** OR **User Information**

**\* E-mail Address:**  
  
**Continue**

**\* Social Security Number (Enter Last 4 Digits):**

**\* Date of Birth:**  
Ex: (MM/DD/YYYY)

**\* First Name:**

**\* Last Name:**

**\* Personal Phone Number:**

**\* Home ZIP/ Postal Code:**  
  
**Continue**

# Retrieve Forgotten User ID - Confirmation

Retrieve Forgotten User ID - Confirmation

 The User ID associated with this account is: XXXXXXXX

[Continue to Change Password](#)

# Reset Password

**CMS** Centers for Medicare & Medicaid Services

Identity & Access Management System [Help](#)

Reset Password [Back to Previous Page](#)

\* indicates required field(s)

Please enter a new password, and the new password again for verification:

\* **New Password:**

\* **Confirm New Password:**

**Password Compliance:**

- Must be different from your previous 6 passwords.
- ✔ Passwords may only be changed once every 24 hours.
- ✘ Must be 8-12 alphanumeric characters.
- ✘ Must contain at least one letter.
- ✘ Must contain at least one number.
- ✘ Must contain at least one [valid special character](#).
- ✘ Must not contain any invalid special characters.
- ✘ Must not start with numeric characters.
- ✘ Must not contain three repeating characters.
- ✘ Must not contain first name or last name.
- ✘ Must not be the same as the User ID.
- ✘ New Password must match Confirm New Password.

**Valid Special Characters:** @ # & ( - \_ ' . , \* ; / \$ !

| [Cancel](#)





Create Your Account

# Create Account Now

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Identity & Access Management System [? Help](#)

[EHR Business Function in I&A](#)

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To learn more about Multi-Factor Authentication (MFA) [click here](#)

# User Registration

**CMS** Centers for Medicare & Medicaid Services  
CENTERS FOR MEDICARE & MEDICAID SERVICES

**Identity & Access Management System** Help


### User Registration

\* indicates required field(s)

**Note:** The e-mail address provided must be a unique e-mail address for you, and will be the e-mail address used to contact you regarding your user account.


\* **E-mail Address:**


\* **Confirm E-mail Address:**

  
[Listen to audio](#)

\* **Enter the text from the image above:**

**Submit** | [Cancel](#)

**Quick Reference Guide**  
Overview of features and tools to manage your account.

**Frequently Asked Questions**  
Answers to common questions about registration, who should register, and how to manage your account.

# User Security

## Identity & Access Management System Help

### User Registration - User Security

Step 1 User Security | Step 2 User Info | Step 3 MFA Setup | Final Review

\* indicates required field(s)

**User ID:**

**Password:**

**Confirm Password:**

**User ID Compliance:**

- Must be 6-12 alphanumeric characters and unique within the Identity & Access Management System and NPPES.
- Must not contain more than four numeric characters, any spaces, or any special characters.
- Must not contain personally identifiable information such as SSN or NPI.

**Password Compliance:**

- ✘ Must be 8-12 alphanumeric characters.
- ✘ Must contain at least one letter.
- ✘ Must contain at least one number.
- ✘ Must contain at least one **valid special character**.
- ✘ Must not contain any invalid special characters.
- ✘ Must not start with numeric characters.
- ✘ Must not contain three repeating characters.
- ✘ Must not be the same as your User ID.
- ✘ Password must match Confirm Password.

**Valid Special Characters:** @ # & ( - \_ ' \* , ; : / \$ !

Please select five different security questions and enter their answers below:

<b>Question 1:</b> <input type="text" value="Select"/>	<b>Answer 1:</b> <input type="text"/>
<b>Question 2:</b> <input type="text" value="Select"/>	<b>Answer 2:</b> <input type="text"/>
<b>Question 3:</b> <input type="text" value="Select"/>	<b>Answer 3:</b> <input type="text"/>
<b>Question 4:</b> <input type="text" value="Select"/>	<b>Answer 4:</b> <input type="text"/>
<b>Question 5:</b> <input type="text" value="Select"/>	<b>Answer 5:</b> <input type="text"/>



# User Information

**Identity & Access Management System** [Help](#)

**User Registration - User Information**

Step 1  User Security | Step 2  User Info | Step 3  MFA Setup | Final  Review

Please provide the details below. They will be used to verify your identity. [Back to Previous Page](#)

\* indicates required field(s)

<b>* First Name:</b> <input type="text"/>	<b>* Personal Phone Number:</b> <input type="text"/>
<b>Middle Name:</b> <input type="text"/>	<b>* Home Address Line 1:</b> <input type="text"/>
<b>* Last Name:</b> <input type="text"/>	<b>Home Address Line 2:</b> <input type="text"/>
<b>Suffix:</b> <input type="text"/>	<b>* City:</b> <input type="text"/>
<b>* Business Phone Number:</b> <input type="text"/>	<b>* Country:</b> United States <input type="text"/>
<b>Fax Number:</b> <input type="text"/>	<b>* State/ Province/ Territory:</b> SE - Select One <input type="text"/>
<b>* Date of Birth: (MM/DD/YYYY)</b> <input type="text"/>	<b>* Postal/ZIP Code:</b> <input type="text"/>
<b>* SSN:</b> <input type="text"/>	
<b>Primary E-mail Address:</b> sam.elliott@email.com	

| [Cancel](#)

# Multi-Factor Authentication Setup

**CMS** Centers for Medicare & Medicaid Services Logged In as SamElliot [Sign Out](#)

**Identity & Access Management System** [Help](#)

**User Registration - Multi-Factor Authentication (MFA) Setup**

Step 1 ✓ User Security | Step 2 ✓ User Info | **Step 3 MFA Setup** | Final Review

[← Back to Previous Page](#)

\* indicates required field(s)

We need a way to deliver a temporary code to you to verify your identity. We can do this via a phone number (either by voice or Text/SMS) or you can choose to have it sent to you in an e-mail. You must enter this code on the next page.

You must identify at least one method for receiving your verification code; however, you may provide up to two different methods.

Please note the following Text/SMS and Voice Call Details:

- International phone numbers are not supported.
- Standard message and data charges may be applied by your carrier.
- By entering a Mobile Phone Number, you are certifying that you are the account holder or have the holder's permission to use the phone number to receive a Text/SMS message.

Please select a Multi-Factor Authentication Method:

\* Authentication Method:

Select Primary Authentication Method  
Phone Number Text/SMS  
E-mail Address  
Phone Number Voice Call

[Continue](#) | [Cancel](#)

# Registration Complete

## User Registration - Registration Complete

Step 1 ✓ User Security → Step 2 ✓ User Info → Step 3 ✓ MFA Setup → Final Complete

**Congratulations, your account has been successfully created.**

- If you are an Individual Provider, you will be able to see all associations with your NPI.
- If you are an Authorized Official or Access Manager, you will need to add your employer(s) to manage staff and connections associated with your employer(s).
- If you are a Staff End User, you may add your employer and ask an Authorized Official or Access Manager associated with your employer to grant you access; or you can ask an Authorized Official or Access Manager associated with your employer to invite you to work on the behalf of the employer.

[Continue To Home Page](#)

Register as an AO, AM or Staff End  
User for Your Employer

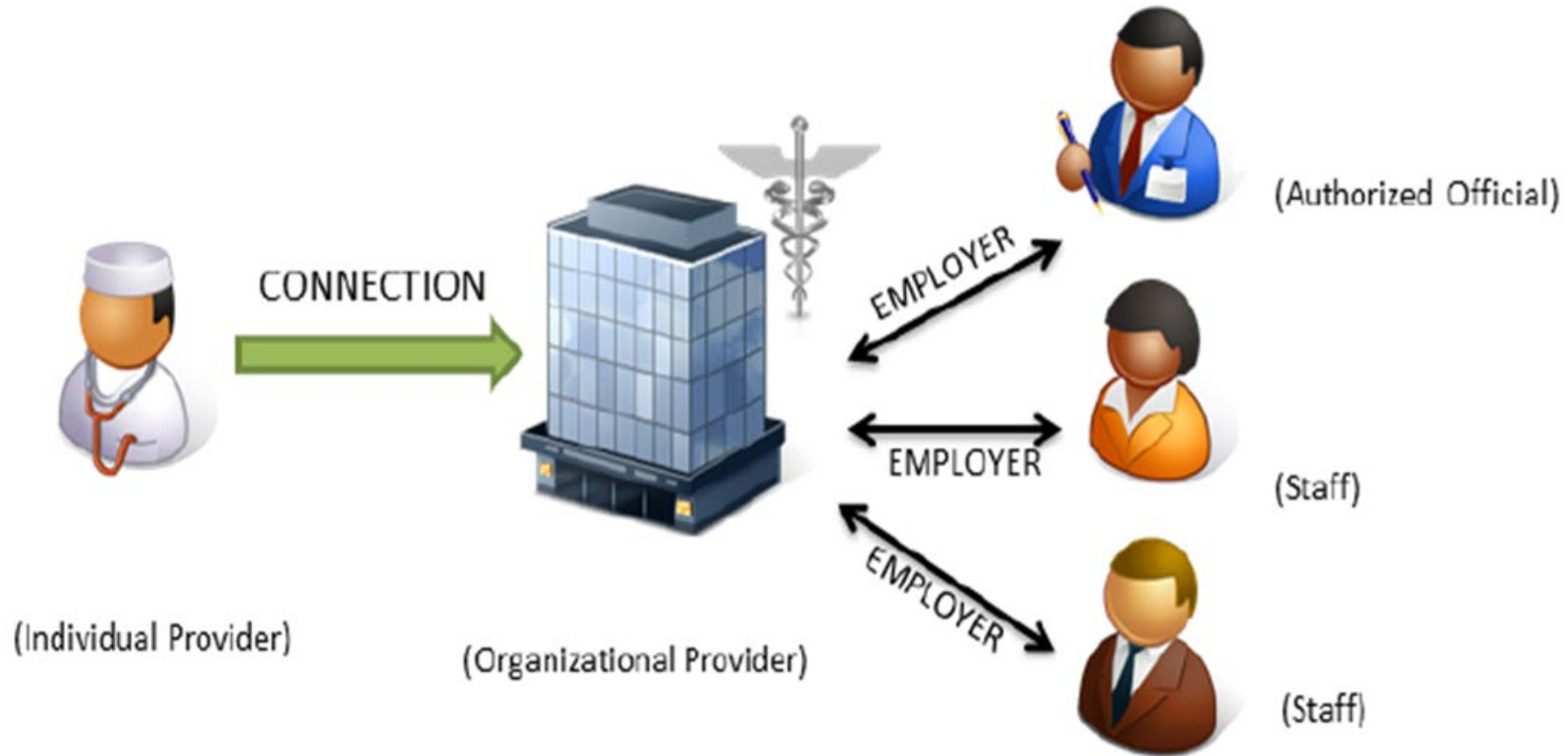


# Roles

Role	Represent an Organization	Manage Staff	Approve/ Manage Connections	Act on Behalf of Provider in CMS systems
<b>Individual Provider</b>	Yes	Yes	Yes	Yes
<b>Authorized Official</b>	Yes	Yes	Yes	Yes
<b>Access Manager</b>	Yes	Yes	Yes	Yes
<b>Staff End User</b>	No	No	No	Yes
<b>Surrogate</b>	No	No	No	Yes



# Roles and Relationships





# Register With Employer

Identity & Access Management System Help

Home My Profile My Connections

### My Profile

My Information

Name: **My Name** Home Address: [Redacted]  
Date of Birth: [Redacted]  
SSN: [Redacted]  
Business Phone Number: [Redacted] Personal Phone Number: [Redacted]  
Fax Number: [Redacted] [Modify My Information](#)

Primary E-mail Address: [Redacted]@email.com [Modify Primary E-mail](#)

Password  
Your Password will expire in **57 day(s)**.  
[Change Password >](#)

Security  
[Change Security Questions & Answers >](#)

Multi-Factor Authentication (MFA)  
Setup/Change your MFA Methods  
[MFA Setup >](#)


### Employer Information

Show:  
 All Employers  
 Only Approved Employers  
 Only Approved and Pending Employers  
 Only Cancelled, Disassociated, and Rejected Employers

Search By: "Employer Name"  [Search](#) [Clear](#)

No Employers Exist.

Employer	My Role with this Employer	My Status with this Employer	PECOS	EHR	NPPES

If you wish to add an employer, click "Add an Employer". [Add an Employer](#) 

# Search on an NPI

## Identity & Access Management System Help

Home My Profile My Connections

### My Profile ► Add Employer Search ◀ Back to Previous Page

Search for Organizations or Individual Providers that you wish to be associated with as your employer. You can search by entering one or more of the following: Organization Name, Individual Provider's Last Name, City, State, ZIP or NPI. If you are searching for a Provider to work on their behalf, please use My Connections.

Organization Name:	<input type="text"/>	NPI:	<input type="text" value="XXXXXXXXXX"/>	<input type="button" value="Search"/>
First Name:	<input type="text"/>	Last Name:	<input type="text"/>	
City:	<input type="text"/>	State:	<input type="text" value="SE - Select One"/>	ZIP: <input type="text"/>

# Search Results

**Identity & Access Management System** ? Help

[Home](#) [My Profile](#) [My Connections](#) [My Staff](#)

**My Profile** ► [Add Employer Search](#) [← Back to Previous Page](#)

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Organization Name:  NPI:

First Name:  Last Name:

City:  State: SE - Select One  ZIP:

**Search Results**

Name	Doing Business As	NPI	View NPI	View Other Name
<input type="radio"/> <b>Group Name</b>		XXXXXXXXXX	<input type="button" value="View NPI(s)"/>	<input type="button" value="View Other Name(s)"/>

If your employer information does not exist, please select "Add Employer Not in List".

# Select Role

Identity & Access Management System Help

Home My Profile My Connections My Staff

**My Profile** ► Add Employer Search [Back to Previous Page](#)

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Organization Name:  NPI:    
First Name:  Last Name:   
City:  State: SE - Select One ▼ ZIP:

Search Results


Name	Doing Business	NPI	View NPI	View Other Name
			<input type="button" value="View NPI(s)"/>	<input type="button" value="View Other Name(s)"/>

**Important Note:** Once approved, Authorized Officials and Access Managers will automatically have access to all Business Functions for their employer and any provider they have been granted access to. Staff End Users must be granted access to Business Functions by an Authorized Official or Access Manager of the employer.

Identify the Contact E-mail Address for this Employer:  
 Use My Primary E-mail Address OR  Enter Employer E-mail Address:  Confirm E-mail Address:

Please select the role you are requesting for this employer:  
-- Select One --  
-- Select One --  
Authorized Official (signatory for your organization authorized to legally bind the organization in agreements)  
Access Manager (managing users, updating account information for your provider/organization)  
Staff End User (working in approved CMS applications for your provider/organization)

If your employer information does not exist, please select "Add Employer Not in List"





# Access Manager or Staff End User


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Identify the Contact E-mail Address for this Employer:

Use My Primary E-mail Address    OR    Enter Employer E-mail Address:    Confirm E-mail Address:

Please select the role you are requesting for this employer:

Access Manager (managing users, updating account information for your provider/organization) 

Staff End User (working in approved CMS applications for your provider/organization)

Please provide the required Authorized Official information associated with this employer:

\*Authorized Official Name:

\*Authorized Official Title:

\*Authorized Official Phone:

\* Authorized Official E-mail Address:

\* Authorized Official Confirm E-mail Address:

If your employer information does not exist, please select "Add Employer Not in List".    [Add Employer Not in List](#)

| [Cancel](#)



# Confirmation and Review

The screenshot shows the 'Identity & Access Management System' interface. The main navigation bar includes 'Home', 'My Profile', 'My Connections', and 'My Staff'. The current page is 'My Profile > Add Employer > Confirmation and Review', with a 'Back to Previous Page' link. A 'Print this page' icon is also present.

**You are requesting to be a(n) Access Manager:**

- You MUST complete Option A or Option B below before your registration to act on behalf of the Organization below will take effect in CMS applications.
- OPTION A:** Print, Sign and Submit to CMS the [Access Manager Certification](#) for this request, along with the CP 575 [\[or approved alternate\]](#) issued by the IRS for the Organization for which you are requesting to be an Access Manager.
- OPTION B:** Please have an existing Authorized Official for this Organization approve your request by logging in to this system.

**Contact Information**

External User Services (EUS)  
PO Box 792750  
San Antonio, Texas 78279  
Phone: 1-866-484-8049  
TTY: 1-866-523-4759  
[EUSsupport@cgi.com](mailto:EUSsupport@cgi.com)

The employer you have registered for is:

Legal Business Name	EIN	Mailing Address	Phone Number	Request Tracking ID
Group Name	*****	Louisville KY 40219-3851		

**Document Management:**

You can upload, view, and delete documents. You can also view, add, and delete comments related to the uploaded documents

[More information about Uploaded Documents](#)

0 of the total required 2 documents for completion have been uploaded.

File Name	Document Type	Comments	Date Added	Actions
-----------	---------------	----------	------------	---------

[Add a Document](#)

NPI(s) associated with your employer are:

NPI	Legal Business Name	Location
-----	---------------------	----------

[Done](#)

# Employer Information

Identity & Access Management System Help

Home **My Profile** My Connections

My Profile

### Employer Information

Employer ▼	My Role with this Employer ▼	My Status with this Employer ▼	PECOS	EHR	NPPES
+ Group Name	Access Manager	Pending Approval <a href="#">Tracking Id</a> XXXXXXXXXX	NO	NO	NO
+ Doe, John	Authorized Official	Approved	YES	YES	YES
+	Staff End User	Approved	NO	NO	YES

# AO Role Request Approval

Home My Profile My Connections **My Staff**

**My Staff - Active Staff**

Role Requests Inactive Staff Add Staff

**CMS** Centers for Medicare & Medicaid Services Logged in as Mehdi101 Sign Out  
Last Logged on 04/09/2020 10:43AM

Identity & Access Management System Help

Home My Profile My Connections **My Staff**

**My Staff - Pending Role Requests**

Active Staff Inactive Staff Add Staff

Pending Role Requests

Search by: Employee Last Name  Employee First Name   
Employer Name

Name	Current Role	Request Role	Action
[Redacted]		Access Manager	<input type="button" value="Approve"/> <input type="button" value="Reject"/>
[Redacted]		Staff End User	<input type="button" value="Approve"/> <input type="button" value="Reject"/>

# Initiate a Connection Request to a Provider

# My Connection Tab

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- Keeping login information secure.
- Selecting strong passwords.
- Reporting any unauthorized use of accounts.

Sharing of login information is strictly prohibited!

**Create Account Now**

**PECOS** Use this system to register for Medicare or update your current enrollment information.

**NPPES** Use this system to apply for and manage National Provider Identifiers (NPIs).

**Quick Reference Guide**  
Overview of features and tools to manage your account.

**Frequently Asked Questions**  
Answers to common questions about registration, who should register, and how to manage your account.

To learn more about Multi-Factor Authentication (MFA) [click here](#)

Identity & Access Management System

Home My Profile **My Connections** My Staff

Home

**My Pending Connections**

These are Pending Connection requests that have been sent to you or your organization and require your action to approve or reject.

Total Pending Providers: 0

Total Pending Surrogates: 0

**News & Alerts**

**EUS Contact Information:**  
External User Services (EUS)  
PO Box 792750  
San Antonio, Texas 78279  
<https://eus.cmshelp.com>

**Application Links**

**NPPES**  
National Plan and Provider Enumeration System

**PECOS**  
Medicare Provider Enrollment, Chain, and Ownership System

**EHR Incentive Programs**  
Promoting Interoperability Programs Registration System

**Quick Actions**

Add Connection

Add Staff

Add Employer

# Find Provider

Identity & Access Management System Help


Home My Profile My Connections My Staff

### My Connections

Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.

Select the name of a Connection to update or view more information about that connection.

Search By: \*Employer Name  Search Clear

Group Name EIN: xxxx 

Identity & Access Management System Help

Home My Profile My Connections My Staff

### My Connections


Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.

Select the name of a Connection to update or view more information about that connection.

Search By: \*Employer Name  Search Clear

Group Name is a surrogate for the following providers:

Group Name has been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed below. use the Find Provider button below to initiate a request to work on behalf of a Provider or Organization not listed here.

Find Provider  Multiple Connections

Group Name has authorized the following surrogates:

The following Individual(s) or Organization(s) have been authorized to work on behalf of Group Name. Use the Add Surrogate button to initiate the process of authorizing an Individual or Organization to work on behalf of Group Name.

Add Surrogate

EIN:\*\*\*-\*\*\*-\*\*\*\*



# Search for a Provider

**Identity & Access Management System** [? Help](#)

[Home](#) [My Profile](#) [My Connections](#) [My Staff](#)

**My Connection** ▶ **Add Provider** [← Back to Previous Page](#)

Search for an Organization or an Individual Provider that you wish to be associated with as a surrogate to work on their behalf. You can search by entering one or more of the following: Organization Name, Individual Provider's Last Name, City, State, ZIP or NPI.

Organization Name:  NPI:

First Name:  Last Name:

City:  State: SE - Select One  ZIP:

**Search Results**

Name ▼	NPI
<input checked="" type="radio"/> Provider Name	XXXXXXXX

Select the business function(s) you would like to access on behalf of the provider:

PECOS

EHR Incentive Program

NPPES

|

# Submit and Review for a Provider

**Identity & Access Management System**

Home My Profile My Connections My Staff

My Connection ► Add Provider [← Back to Previous Page](#)

You have requested to work on behalf of **Provider Name** as a surrogate. Once the connection has been approved, you will automatically be connected to all associated NPI's. Review the information listed below before you continue.

Name: **Provider Name**

Business Function(s) Selected:

- PECOS
- EHR Incentive Program
- NPPES

To send this connection request notification to a another e-mail address in addition to what is currently on file for this provider, enter the additional e-mail address below.

Additional E-mail Address:

NPI(s) Associated with this Provider:

Provider Name	Doing Business As	NPI	Business Mailing Address
<b>Provider</b>		XXXXXXXXXX	Harrisburg, PA 17110-9436

Submit | Cancel

**Identity & Access Management System**

Home My Profile My Connections My Staff

My Connections

Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.

Select the name of a Connection to update or view more information about that connection.

Search By: \*Employer Name

**Group Name** is a surrogate for the following providers:

**Group Name** has been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed below. Use the Find Provider button below to initiate a request to work on behalf of a Provider or Organization not listed here.

Name	Tracking ID	Business Function	Access Status
<b>Provider Name</b>	<a href="#">XXXX</a>	PECOS	Pending
	<a href="#">XXXX</a>	EHR Incentive Program	Pending
	<a href="#">XXXX</a>	NPPES	Pending

# Approve Connection Request By Provider

Home Tab

The screenshot displays the 'Identity & Access Management System' interface. At the top, there is a navigation bar with tabs for 'Home', 'My Profile', 'My Connections', and 'My Staff'. The 'Home' tab is selected and highlighted with a red box. Below the navigation bar, the main content area is titled 'Home' and contains a section for 'My Pending Connections'. This section includes a summary box stating 'Total Pending Providers: 0' and another summary box with a warning icon stating 'Total Pending Surrogates: 3'. Below these summaries, there is a table of pending requests with columns for 'Surrogate', 'Provider', 'PECOS', 'EHR', and 'NPES'. The 'Surrogate' column is further divided into 'Group Name'. At the bottom of the table, there are three buttons: 'Select All', 'Approve All Selected', and 'Reject All Selected'. To the right of the main content area, there is a sidebar with 'News & Alerts' and 'Quick Actions' sections. The 'Quick Actions' section contains three buttons: 'Add Connection', 'Add Staff', and 'Add Employer'.

**Identity & Access Management System** Help

**Home** My Profile My Connections My Staff

### Home

#### My Pending Connections

These are Pending Connection requests that have been sent to you or your organization and require your action to approve or reject.

**Total Pending Providers: 0**

**Total Pending Surrogates: 3**

Below are Individuals or Organizations who are asking you to authorize them as a Surrogate for you (or your organization). Approving these requests will allow them to access and update your information in the CMS systems you specify.

Pending Requests

Surrogate	Provider	PECOS	EHR	NPES
Group Name	Provider Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select All Approve All Selected Reject All Selected

#### News & Alerts

**EUS Contact Information:**  
External User Services (EUS)  
PO Box 792750  
San Antonio, Texas 78279  
<https://eus.custhelp.com>

#### Quick Actions

Add Connection  
Add Staff  
Add Employer



Initiate a Connection Request to a  
Group/Entity

# My Connection Tab – Individual Provider

**CMS** Centers for Medicare & Medicaid Services

## Identity & Access Management System

[EHR Business Function in I&A](#)

Starting October 1, 2023, the Promoting Interoperability Programs (previously known as The Medicare and Medicaid Electronic Health Records (EHR) Incentive Programs) website will be decommissioned and current users will no longer have access to the website. All options to add the EHR business function to staff will be removed in I&A and all pending requests for EHR will be rejected.

Authorized users are able to sign in to the Identity & Access Management System. If you are a new user you must first [register](#).

### Sign In

\* indicates required field(s)

\* **User ID:**

\* **Password:**

**Sign In**

[Forgot Password](#)

[Retrieve Forgotten User ID](#)

[Enter your PIN](#)

### One account to access multiple systems

Create one account with the Identity & Access Management System to manage access to NPPES and PECOS, manage staff, and authorize others to access your information.

IMPORTANT! - Every individual user with access to the I&A system is responsible for:

- Keeping login information secure.
- Selecting strong passwords.
- Reporting any unauthorized use of accounts.

Sharing of login information is strictly prohibited!

**Create Account Now**

**PECOS** Use this system to register for Medicare or update your current enrollment information.

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**Quick Reference Guide**  
Overview of features and tools to manage your account.

**Frequently Asked Questions**  
Answers to common questions about registration, who should register, and how to manage your account.

To learn more about Multi-Factor Authentication (MFA) [click here](#)

## Identity & Access Management System

[Home](#) [My Profile](#) **My Connections** [My Staff](#)

### Home

### My Pending Connections

These are Pending Connection requests that have been sent to you or your organization and require your action to approve or reject.

**Total Pending Providers: 0**

**Total Pending Surrogates: 0**

#### News & Alerts

**EUS Contact Information:**  
External User Services (EUS)  
PO Box 792750  
San Antonio, Texas 78279  
<https://eus.cmshelp.com>

#### Application Links

[NPPES](#)  
National Plan and Provider Enumeration System

[PECOS](#)  
Medicare Provider Enrollment, Chain, and Ownership System

[EHR Incentive Programs](#)  
Promoting Interoperability Programs Registration System

#### Quick Actions

**Add Connection**

**Add Staff**

**Add Employer**

# Add Surrogate

Identity & Access Management System Help

Home My Profile **My Connections** My Staff

### My Connections

Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.

Select the name of a Connection to update or view more information about that connection.

Search By: \*Employer Name  Search Clear

**Provider Name**

Identity & Access Management System Help

Home My Profile **My Connections** My Staff

### My Connections

Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.

Select the name of a Connection to update or view more information about that connection.

Search By: \*Employer Name  Search Clear

**Provider Name** is a surrogate for the following providers:

**Provider Name** is been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed below. Use the Find Provider button below to initiate a request to work on behalf of a Provider or Organization not listed here.

Find Provider Multiple Connections

**Provider Name** has authorized the following surrogates:

The following Individual(s) or Organization(s) have been authorized to work on behalf of **Provider Name**. Use the Add Surrogate button to initiate the process of authorizing an Individual or Organization to work on behalf of **Provider Name**.

Add Surrogate



# Search for a Group

**Identity & Access Management System** [? Help](#)

[Home](#) [My Profile](#) [My Connections](#) [My Staff](#)

**My Connection** ▶ [Add Provider](#) [◀ Back to Previous Page](#)

Search for an Organization or an Individual Provider that you wish to work on your behalf. You can search by entering one or more of the following: Organization Name, Individual Provider's Last Name, City, State, ZIP or NPI.

Organization Name:  NPI:

First Name:  Last Name:

City:  State:  ZIP:



**Search Results**

Name ▼	NPI	E
<input checked="" type="radio"/> Group Name	XXXXXXXX	

Select the business function(s) you would like to access on behalf of the provider:

PECOS  EHR Incentive Program  NPPEs

|



# Submit and Review for a Group

Home My Profile **My Connections** My Staff

My Connection ► Add Surrogate [Back to Previous Page](#)

You have requested **Group Name** to work on behalf of your provider. Review the information listed below before you continue.

**Your Provider Information**

Name: **Provider Name**  
Doing Business As (DBA):  
NPI: XXXXXXXXXX

**Surrogate Information**

Name: **Group name**  
Business Mailing Address: Harrisburg, PA 17110-9436  
Business Function(s) Selected:  
• PECOS  
• EHR Incentive Program  
• NPPES

To send this connection request notification to a another e-mail address in addition to what is currently on file for this surrogate, enter the additional e-mail address below.

Additional E-mail Address:

Submit | Cancel

Identity & Access Management System [Help](#)

Home My Profile **My Connections** My Staff

**My Connections**

Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.

Select the name of a Connection to update or view more information about that connection.

Search By:  **Employer Name**

**Provider Name**  
Provider **Name** is a surrogate for the following providers:

Duck, Donald has been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed below. Use the Find Provider button below to initiate a request to work on behalf of a Provider or Organization not listed here.

**Provider Name** has authorized the following surrogates:

The following Individual(s) or Organization(s) have been authorized to work on behalf of **Provider Name**. Use the Add Surrogate button to initiate the process of authorizing an Individual or Organization to work on behalf of **Provider Name**.

Name	Tracking ID	Business Function	Access Status
<input type="checkbox"/> <b>Group Name</b>	<a href="#">XXXX</a>	PECOS	Pending
	<a href="#">XXXX</a>	EHR Incentive Program	Pending
	<a href="#">XXXX</a>	NPPES	Pending

NPI: XXXXXXXXXX



# Approval Connection Request by AO/AM

Home Tab

The screenshot displays the 'Identity & Access Management System' interface. At the top, there is a navigation bar with tabs for 'Home', 'My Profile', 'My Connections', and 'My Staff'. The 'Home' tab is selected. Below the navigation bar, the main content area is titled 'Home' and 'My Pending Connections'. A message states: 'These are Pending Connection requests that have been sent to you or your organization and require your action to approve or reject.' A yellow warning box highlights 'Total Pending Providers: 0'. Below this, a section titled 'Pending Requests' contains a table with columns for 'Provider', 'Surrogate', 'PECOS', 'EHR', and 'NPPES'. The 'Provider' column is further divided into 'Provider Name' and 'Group Name'. At the bottom of the table, there are three buttons: 'Select All', 'Approve All Selected', and 'Reject All Selected'. To the right of the main content, there is a 'News & Alerts' section with 'EUS Contact Information' and a 'Quick Actions' section with buttons for 'Add Connection', 'Add Staff', and 'Add Employer'.

**Identity & Access Management System** Help

**Home** | My Profile | My Connections | My Staff

### Home

#### My Pending Connections

These are Pending Connection requests that have been sent to you or your organization and require your action to approve or reject.

**Total Pending Providers:** 0

These are Individual Providers or Healthcare Organizations who have requested you (or your organization) to work on their behalf. Approving these requests will allow you and your staff to work on their behalf.

Pending Requests

Provider	Surrogate	PECOS	EHR	NPPES
Provider Name	Group Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#### News & Alerts

**EUS Contact Information:**  
External User Services (EUS)  
PO Box 792750  
San Antonio, Texas 78279  
<https://eus.custhelp.com>

#### Quick Actions

# Manage Your Employees and Their Access

# Add/Modify Staff, Approve Role Requests

My Staff Tab

**Identity & Access Management System** Help

Home My Profile My Connections **My Staff**

**My Staff - Active Staff**

Role Requests Inactive Staff **Add Staff**

Active Staff

Search by: Employee Last Name  Employee First Name   
Employer Name  Search Clear

Name ▼	Role	PECOS	EHR Incentive Program	NPPES
+ <input type="text"/>	<span>Modify</span>			
+ <input type="text"/>	<span>Modify</span>			
+ <input type="text"/>	<span>Modify</span>			
+ <input type="text"/>	<span>Modify</span>			
+ <input type="text"/>	<span>Modify</span>			

# Add Staff

Home My Profile My Connections **My Staff**

**My Staff** ► Add Staff [← Back to Previous Page](#)

\* indicates required field(s)

Enter the name and e-mail address of the new staff user you wish to add. Note that the specified e-mail address will be assigned to all the selected employers.

Then, select the Employer(s) the staff user is to be granted access to and select Role the staff user should have for that employer.

Please be aware the PIN generated for this invitation will expire in 72 hours.

\* **First Name:**

**Middle Name:**

\* **Last Name:**

\* **E-mail Address:**

\* **Confirm E-mail Address:**

<input type="checkbox"/> Employer	Role	<input type="checkbox"/> PECOS	<input type="checkbox"/> EHR	<input type="checkbox"/> NPPES
<input type="checkbox"/> <b>Group Name</b> EIN: ***-***-***	<input type="text" value="-- Select One --"/> Staff End User Access Manager	<input type="checkbox"/> PECOS	<input type="checkbox"/> EHR	<input type="checkbox"/> NPPES
<input type="checkbox"/> <b>Provider</b> NPI: xxxxxxxxxx	<input type="text" value="-- Select One --"/>	<input type="checkbox"/> PECOS	<input type="checkbox"/> EHR	<input type="checkbox"/> NPPES

Submit



# Approval By Staff

Fro: [redacted]@reply@cms.gov  
To: jane.doe@email.com  
Subject: You've been invited to register with the Centers for Medicare and Medicaid Identity & Access System

Jon Snow requested that you register as a staff user for your employer(s) AAG Org One, JON SNOW in the Centers for Medicare and Medicaid Services Identity & Access (I&A) system. To continue, please either click on the PIN Entry Page link provided below or cut and paste the link into your browser and enter the e-mail address and the PIN provided below. Note that the PIN will expire in 72 hours if not used.

PIN Entry Page: [https://nppes.cms.cmstest/IAWeb/register/register\\_pin.do](https://nppes.cms.cmstest/IAWeb/register/register_pin.do) ←

PIN: \_XXXXXXXX\_ ←

Invitation Tracking ID: \_XXXX\_

Systems that currently accept I&A log in credentials:  
Internet-based PECOS (<https://pecos.cms.hhs.gov>)  
EHR Incentive Program (<https://ehrincentives.cms.gov>)  
NPPES (<https://nppes.cms.hhs.gov>)

Please do not reply to this message via e-mail. This address is automated, unattended, and cannot help with questions or requests. If you have any questions, please contact the External User Services (EUS) Help Desk:  
External User Services (EUS) Help Desk  
PO Box 792750  
San Antonio, TX 78279  
1-866-484-8049  
EUSsupport@cgi.com

# Enter Your PIN

**CMS** Centers for Medicare & Medicaid Services

## Identity & Access Management System

[Help](#)

**EHR Business Function in I&A**

Starting October 1, 2023, the Promoting Interoperability Programs (previously known as The Medicare and Medicaid Electronic Health Records (EHR) Incentive Programs) website will be decommissioned and current users will no longer have access to the website. All options to add the EHR business function to staff will be removed in I&A and all pending requests for EHR will be rejected.

Authorized users are able to sign in to the Identity & Access Management System. If you are a new user you must first [register](#).

### Sign In

\* indicates required field(s)

\* **User ID:**

\* **Password:**

**Sign In**

[Forgot Password](#)

[Retrieve Forgotten User ID](#)

**Enter your PIN**

### One account to access multiple systems

Create one account with the Identity & Access Management System to manage access to NPPES and PECOS, manage staff, and authorize others to access your information.

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- Selecting strong passwords.
- Reporting any unauthorized use of accounts.

Sharing of login information is strictly prohibited!

**Create Account Now**

**PECOS** Use this system to register for Medicare or update your current enrollment information.

**NPPES** Use this system to apply for and manage National Provider Identifiers (NPIs).

**Quick Reference Guide**  
Overview of features and tools to manage your account.

**Frequently Asked Questions**  
Answers to common questions about registration, who should register, and how to manage your account.

To learn more about Multi-Factor Authentication (MFA) [click here](#)

# Enter Email and PIN

The screenshot shows the CMS Identity & Access Management System login page. At the top, the CMS logo and text 'Centers for Medicare & Medicaid Services' are displayed. Below this, the page title 'Identity & Access Management System' is shown, along with a 'Help' link. The main content area is titled 'Enter PIN' and contains a form with two required fields: '\*E-mail Address:' and '\*PIN:'. Each field has a corresponding text input box. At the bottom of the form, there are two buttons: a dark 'Submit' button with a right-pointing arrow and a light blue 'Cancel' link.

**CMS** Centers for **Medicare & Medicaid** Services  
CENTERS FOR MEDICARE & MEDICAID SERVICES

**Identity & Access Management System** [? Help](#)

**Enter PIN**

\* indicates required field(s)

\***E-mail Address:**

\***PIN:**

**Submit** | [Cancel](#)

# Modify Role

Name ▼	Role	PECOS	EHR Incentive Program	NPPES
+ Jones, Samuel	<span>Modify</span>			
+ nppes, Kavitha	<span>Modify</span>			
+ Shelton, Blake	<span>Modify</span>			

Eleven-six, MFA

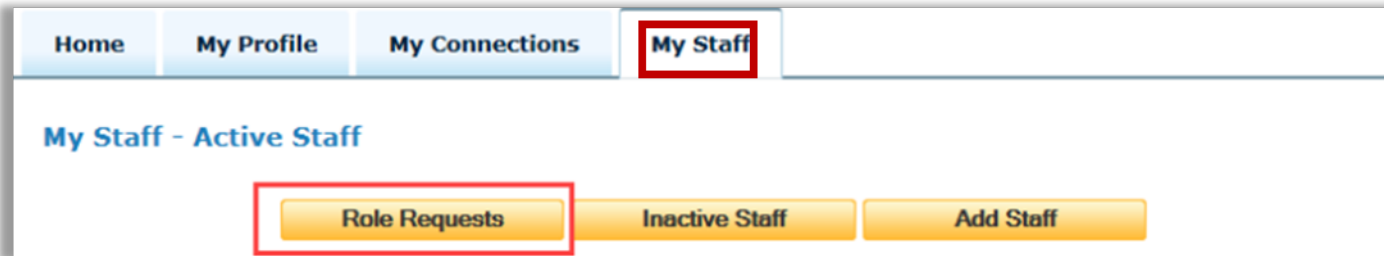
Modify All Current Access Role   PECOS  EHR  NPPES

	Employer	Role	PECOS	EHR	NPPES
<span>Add Access</span>	mercy EIN: **-***6668		<input type="checkbox"/> PECOS	<input type="checkbox"/> EHR	<input type="checkbox"/> NPPES
<span>Modify Access</span>	trussell pharmacy EIN: **-***9974	Access Manager	<input checked="" type="checkbox"/> PECOS	<input checked="" type="checkbox"/> EHR	<input checked="" type="checkbox"/> NPPES

Modify All Current Access Role   PECOS  EHR  NPPES

- Select One --
- Staff End User
- Access Manager

# AO Role Request Approval



This screenshot shows a navigation bar with four tabs: Home, My Profile, My Connections, and My Staff. The 'My Staff' tab is highlighted with a red border. Below the navigation bar, the page title is 'My Staff - Active Staff'. Underneath, there are three yellow buttons: 'Role Requests' (highlighted with a red border), 'Inactive Staff', and 'Add Staff'.



This screenshot shows the 'My Staff - Pending Role Requests' page within the CMS Identity & Access Management System. The page header includes the CMS logo, 'Centers for Medicare & Medicaid Services', and user information: 'Logged in as Mehdi101 Sign Out' and 'Last Logged on 04/09/2020 10:43AM'. The navigation bar is the same as in the previous screenshot. The page title is 'My Staff - Pending Role Requests'. Below the title are three yellow buttons: 'Active Staff', 'Inactive Staff', and 'Add Staff'. The main content area is titled 'Pending Role Requests' and contains a search section with the following fields and buttons:

Search by: Employee Last Name  Employee First Name   
Employer Name

Name	Current Role	Request Role	Action
[Redacted]	[Redacted]	Access Manager	<input type="button" value="Approve"/> <input type="button" value="Reject"/>
[Redacted]	[Redacted]	Staff End User	<input type="button" value="Approve"/> <input type="button" value="Reject"/>

# Contact Information and Resources







# Contact Information

For Assistance With	Contact	Contact Information
<ul style="list-style-type: none"><li>• Changing an NPPES password</li><li>• Establishing a new user ID and password for NPPES</li><li>• Questions related to the NPI application</li></ul>	NPI Enumerator	Phone: 800-465-3203 TTY: 800-692-2326 Email: <a href="mailto:customerservice@npienumerator.com">customerservice@npienumerator.com</a>
<ul style="list-style-type: none"><li>• Errors encountered while accessing or entering information in PECOS</li><li>• Forgotten PECOS user ids and passwords</li></ul>	EUS Help Desk	Phone: 866-484-8049 TTY: 866-523-4759 Email: <a href="mailto:EUSsupport@cgi.com">EUSsupport@cgi.com</a> Live Chat: <a href="https://eus.custhelp.com/">https://eus.custhelp.com/</a>

# NGS Website

Contact Us NGSConnex Subscribe for Email Updates Part A Provider in Connecticut ( JK ) ▾

 national government SERVICES

HOME EDUCATION ▾ RESOURCES ▾ EVENTS ENROLLMENT APPS ▾ 

## Mailing Addresses

For ADRs, claims, EDI, FOIA, medical policy, enrollment, or other inquiries.

## Provider Enrollment

# Resources

- Quick reference guides and FAQs for creating and managing accounts
  - [Identity & Access System Quick Reference Guide](#)
  - [CMS Identity & Access Management System](#)

# Summary

- CMS systems and relationships
  - NPPES
  - PECOS
  - I&A
- Retrieve and create I&A user account and accessing enrollments
- Manage staff's access
- Contact information and resources

# Connect with us on Social Media



[YouTube Channel](#)

Educational Videos



[www.MedicareUniversity.com](http://www.MedicareUniversity.com)

Self-paced online learning

medicare **mobile**

Text NEWS to 37702; Text GAMES to 37702

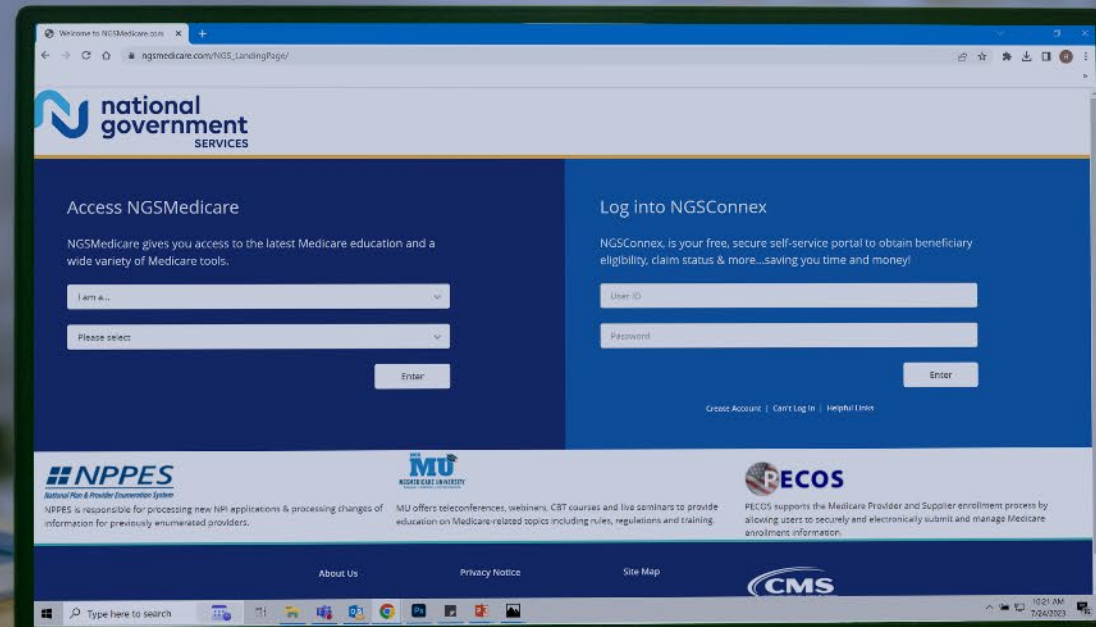


[LinkedIn](#)

Educational Content



# Find us online



[www.NGS Medicare.com](http://www.NGS Medicare.com)

Online resources, event calendar, LCD/NCD, and tools



IVR System

The interactive voice response system (IVR) is available 24-hours a day, seven days a week to answer general inquiries



[NGSConnex](#)

Web portal for claim information



[Sign up for Email Updates](#)

Subscribe for Email updates at the top of any NGS Medicare.com webpage to stay informed of news



# Questions?

Thank you! A follow-up email will be sent to attendees with the Medicare University Course Code.