national government SERVICES

Getting Access to PECOS

3/3/2023

NGSMU

NGS PEX

CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

1595_0323

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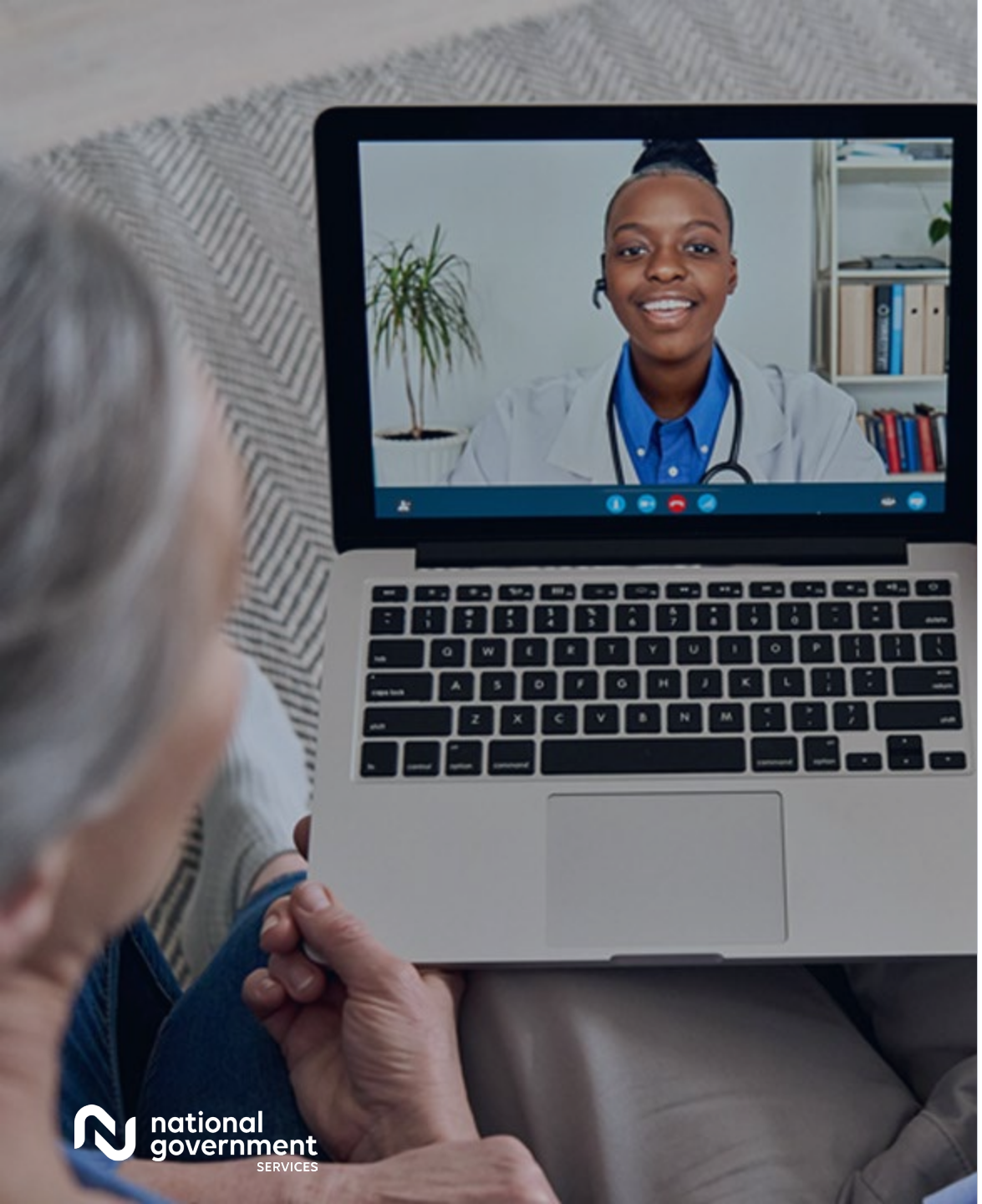

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Objectives

Know benefits of using PECOS.

Understand the CMS systems and their relationships.

How to retrieve or create an I&A user account.

How to get connected to organization/individual enrollments and manage staff's access.

Today's Presenters : Laura Brown, CPC & Susan Stafford PMP, COA, AMR

- 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

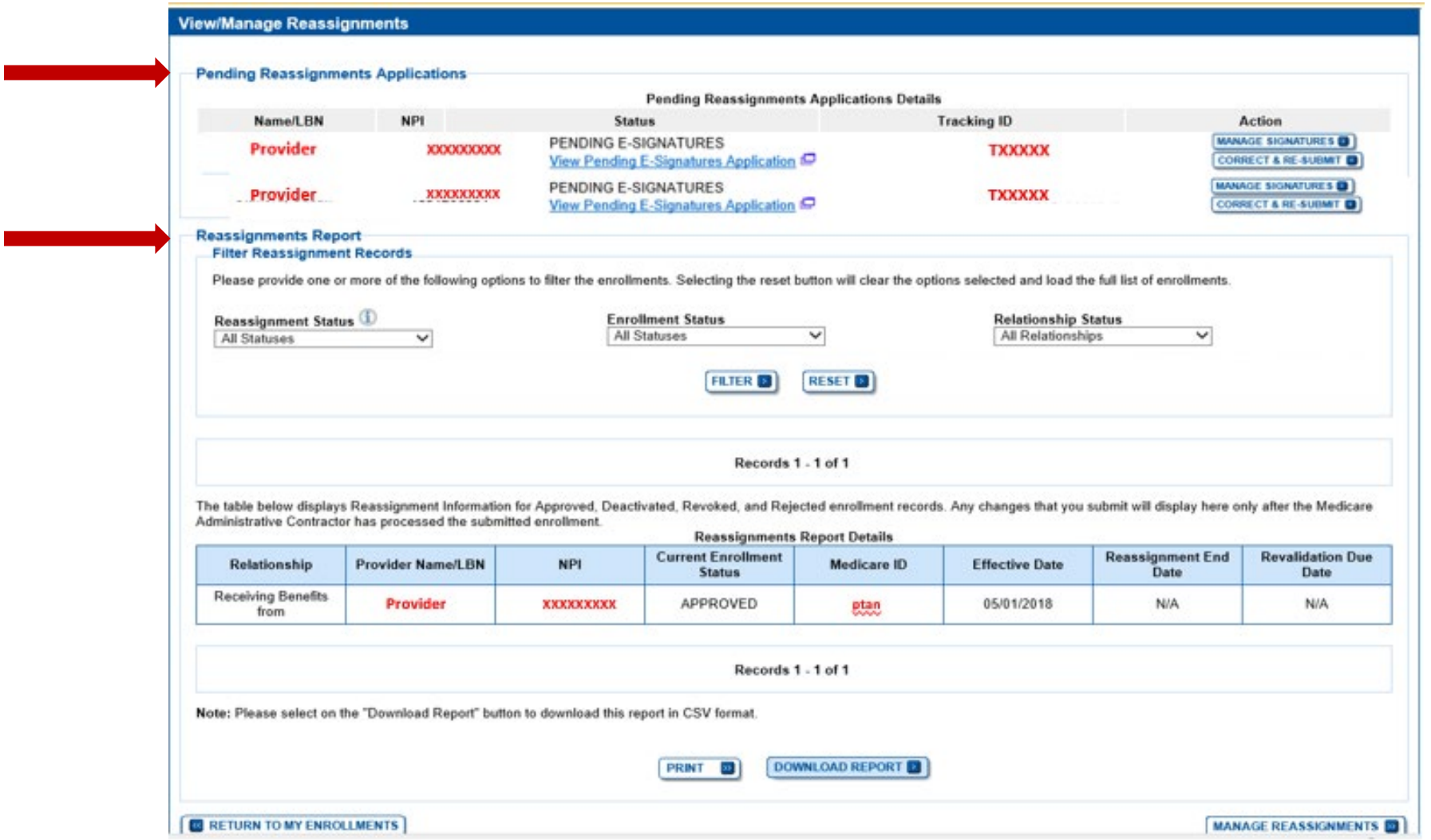
- Access to provider enrollment information currently on file with Medicare, submitted
  - Electronic via PECOS
  - CMS paper application
- Submit electronic application for any scenario to update, add or delete provider enrollment information with the following features
  - Electronic signatures or 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

View/Manage Reassignments Report

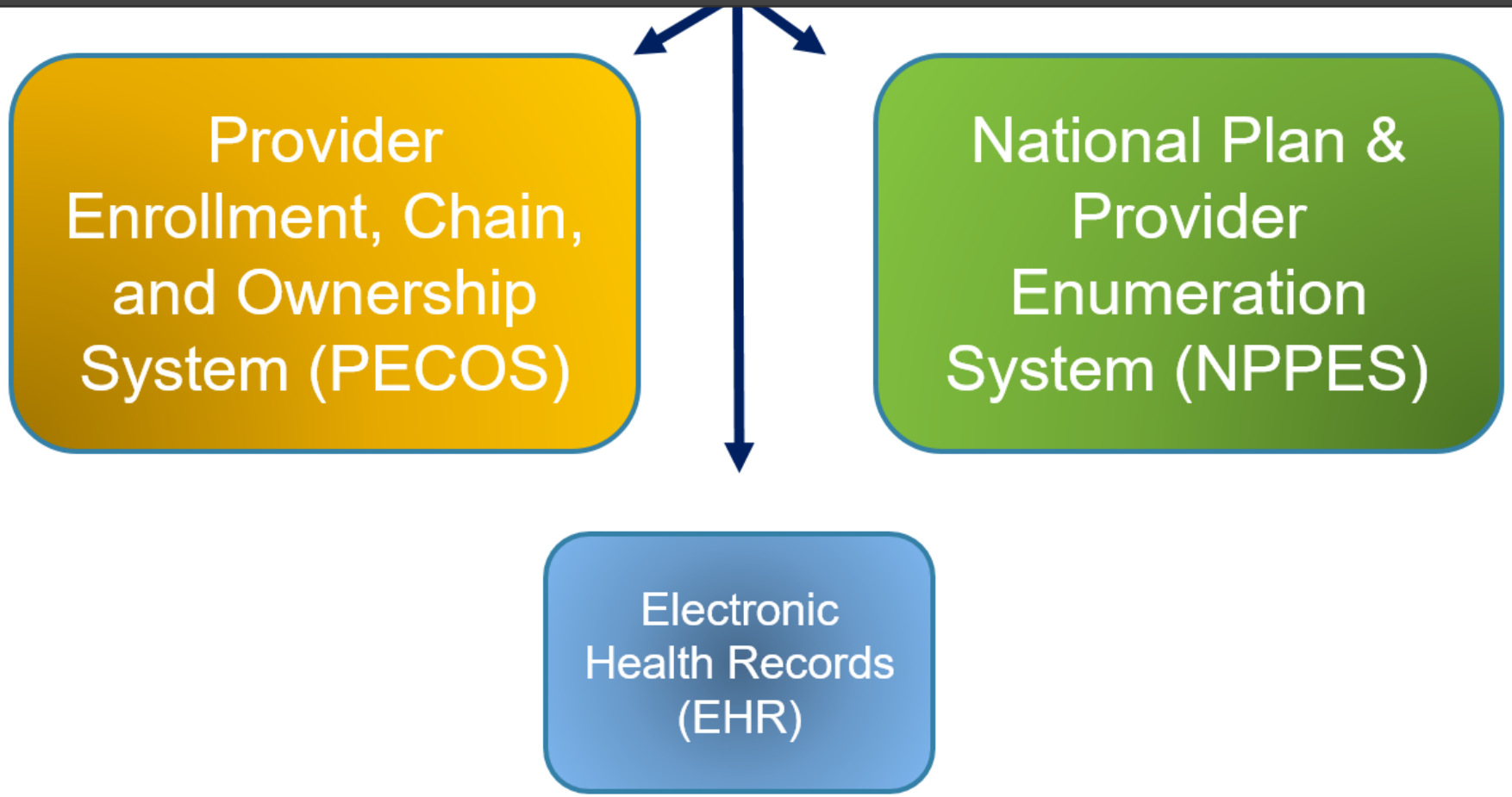


Learn About PECOS

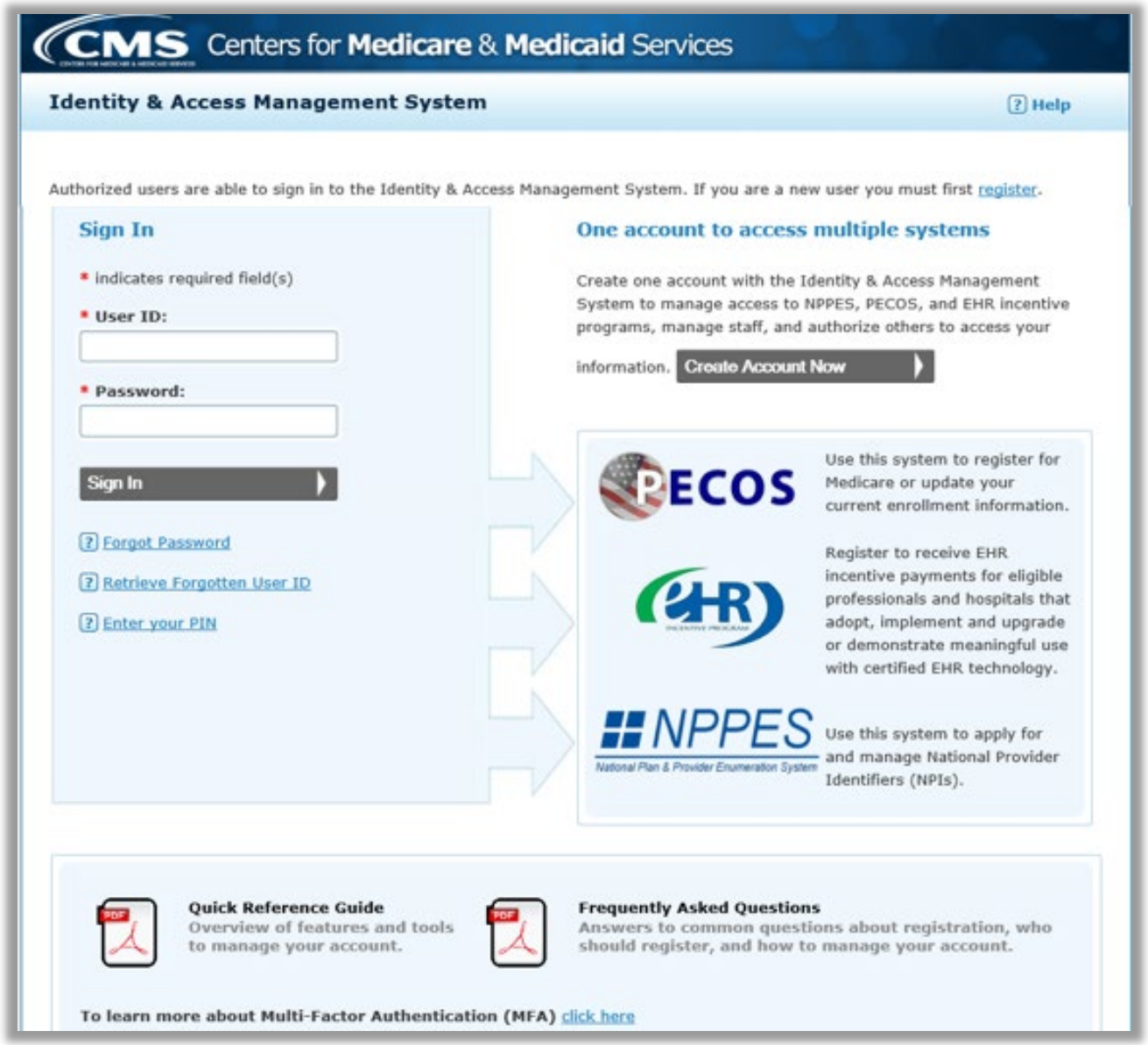
- NGS website
  - Learn About PECOS Web Part A or Part B
    - ✓ Links to all three systems, PECOS, I&A, NPPES
- CMS website
  - Internet-based PECOS
- PECOS website
  - Provider and Supplier Resources
    - ✓ Enrollment Tutorials
    - ✓ Accessibility

CMS Systems and Relationship

Identity & Access (I&A) Management System



Identity & Access Management System

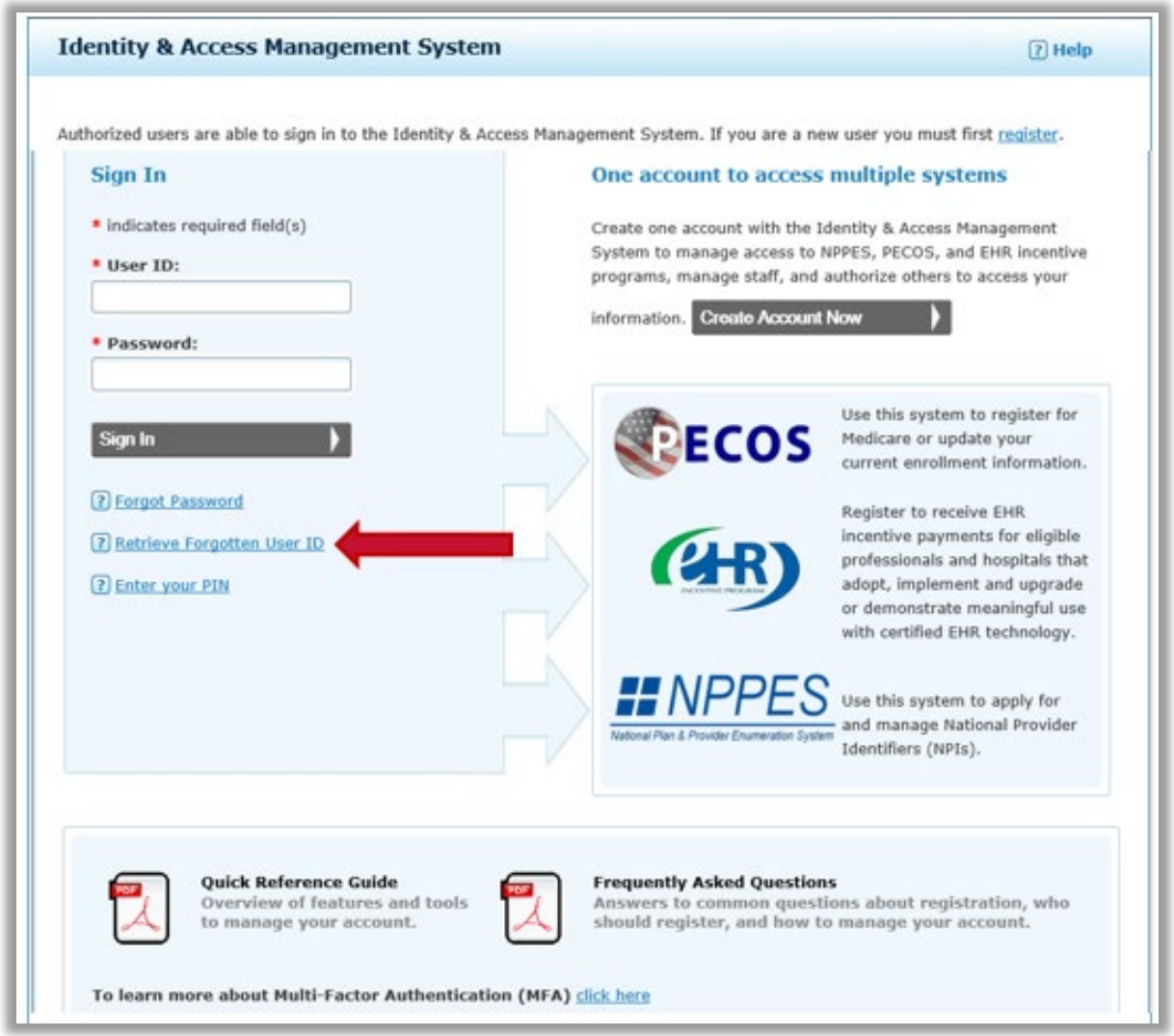


I&A Management System

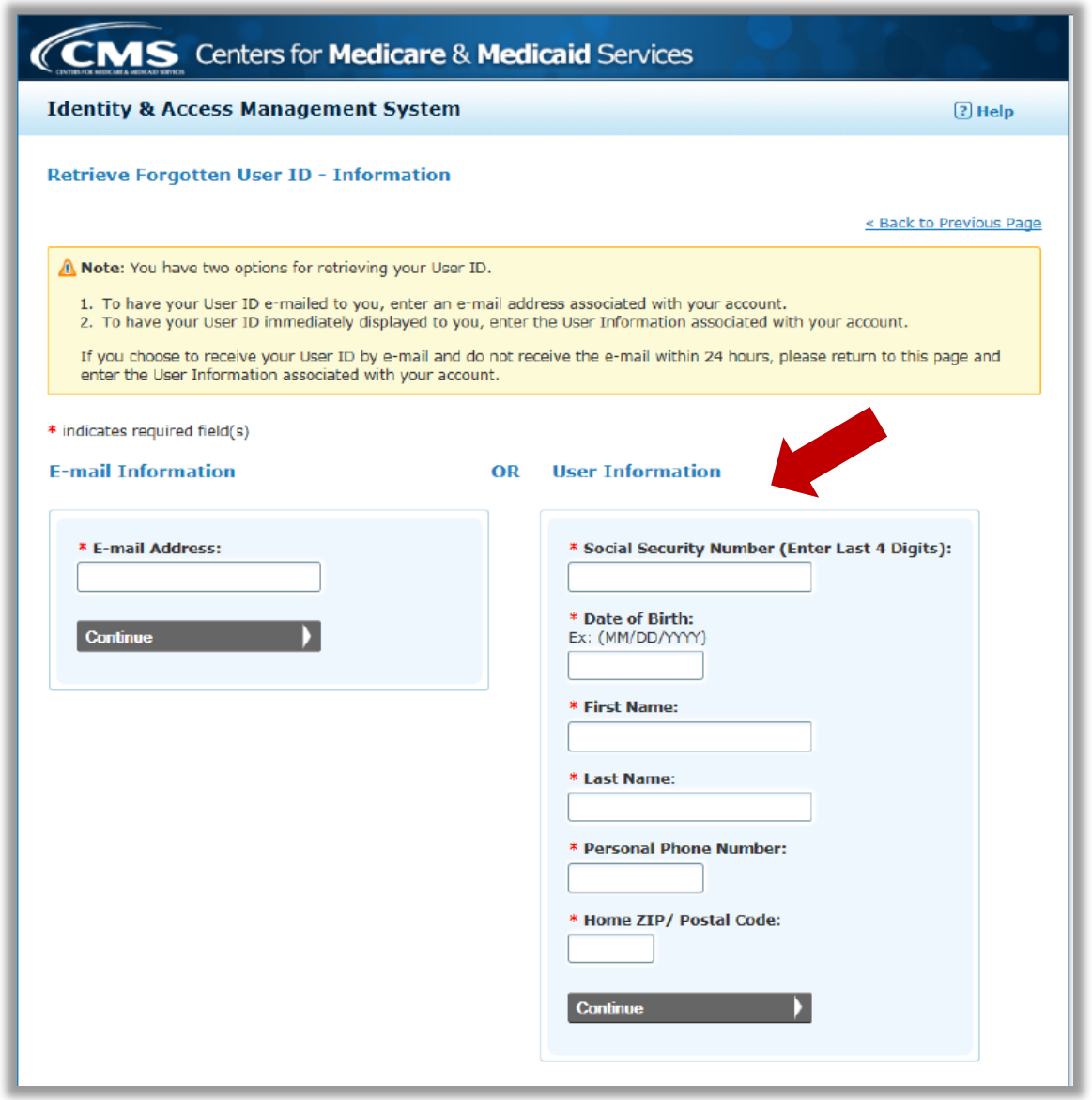
- Purpose for I&A security system
  - Individual profile for user ID to access multiple systems
    - ✓ PECOS (Medicare provider enrollment information)
    - ✓ NPPES (NPI information)
    - ✓ EHR (Electronic Health Records Incentive Program)
  - Connection to organization and individual enrollments
  - Authorize and manage staffs access to enrollment information

Retrieve Forgotten User ID

Retrieve Forgotten User ID

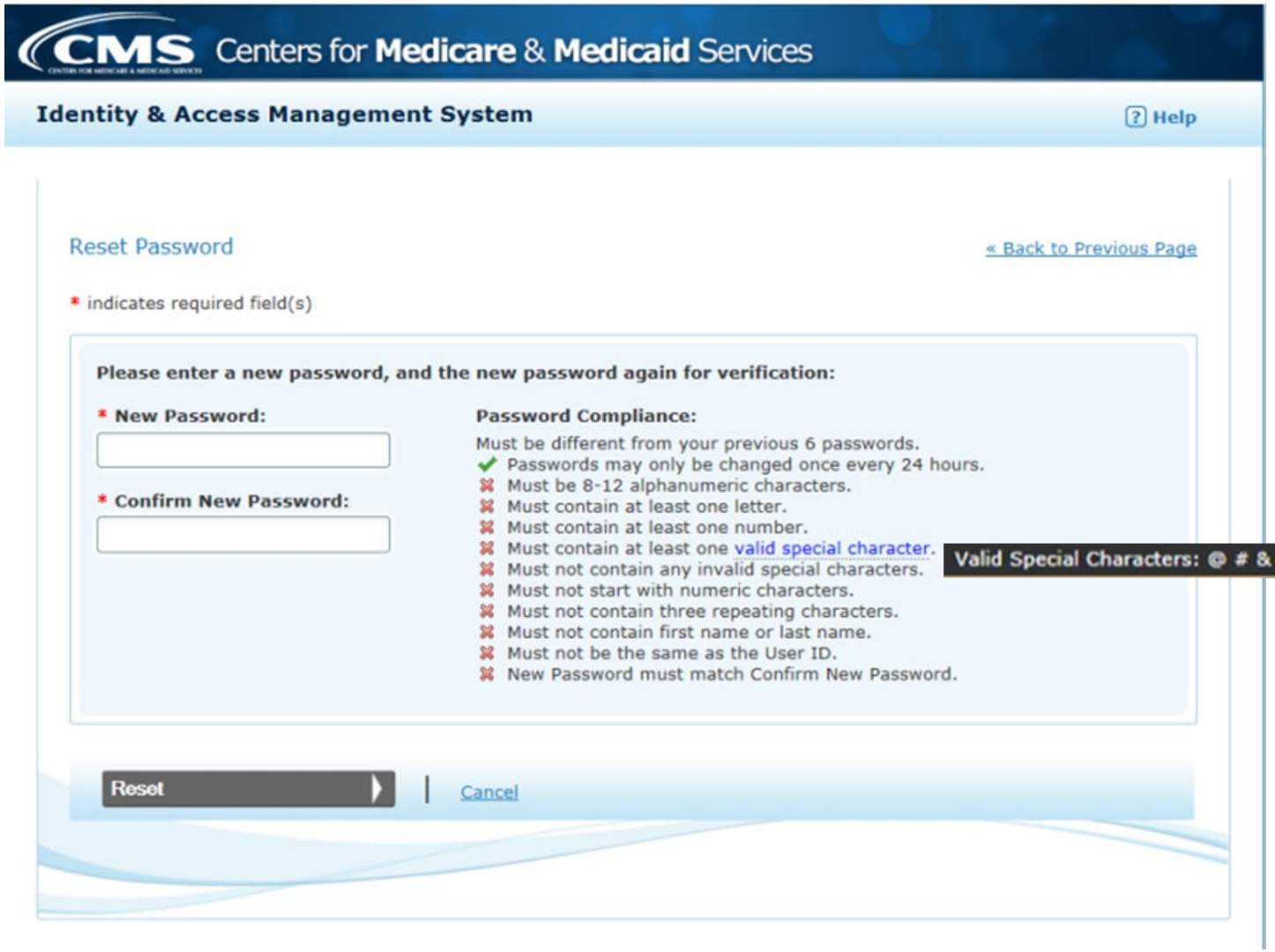


Retrieve Forgotten User ID - Information



Retrieve Forgotten User ID - Confirmation

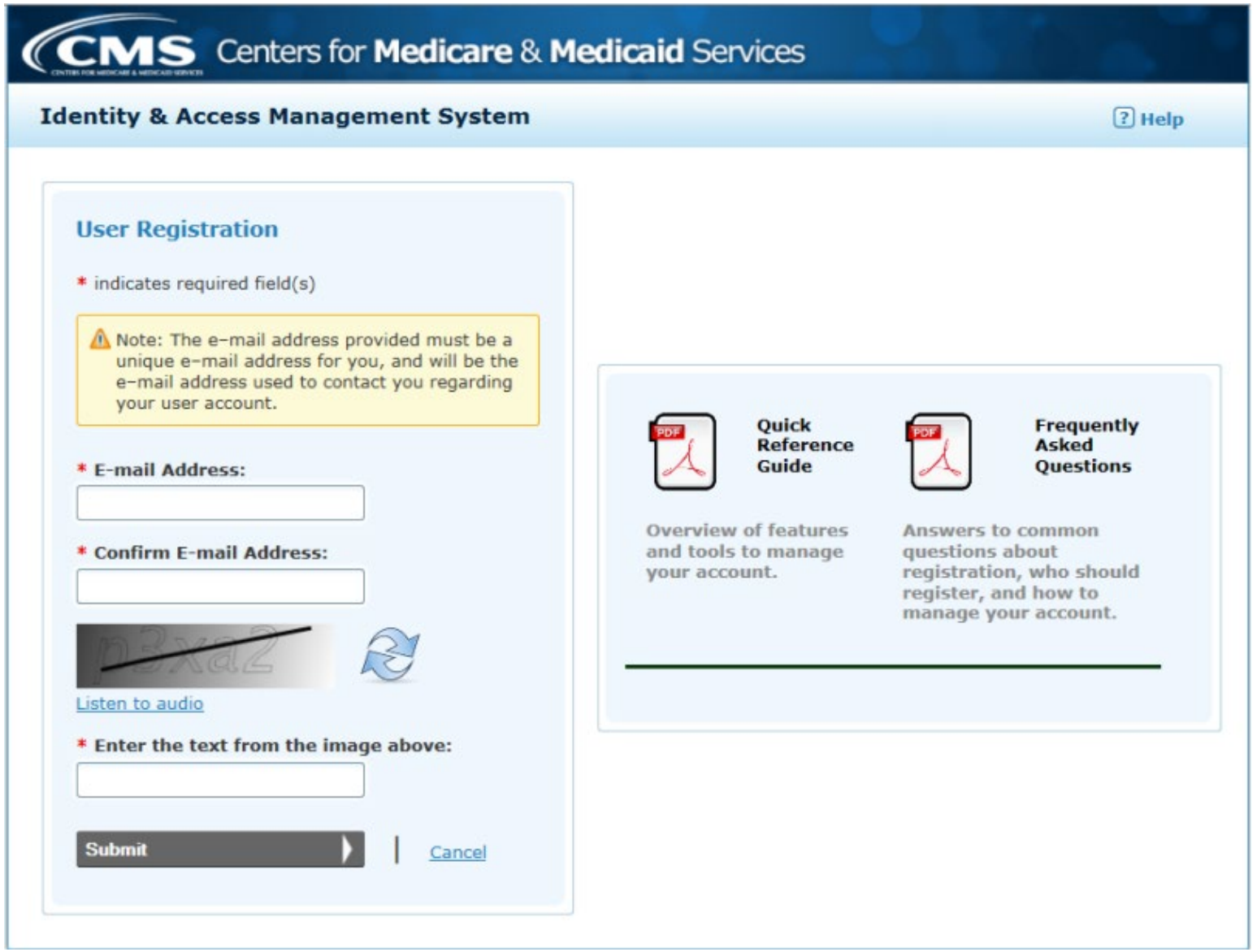
Reset Password



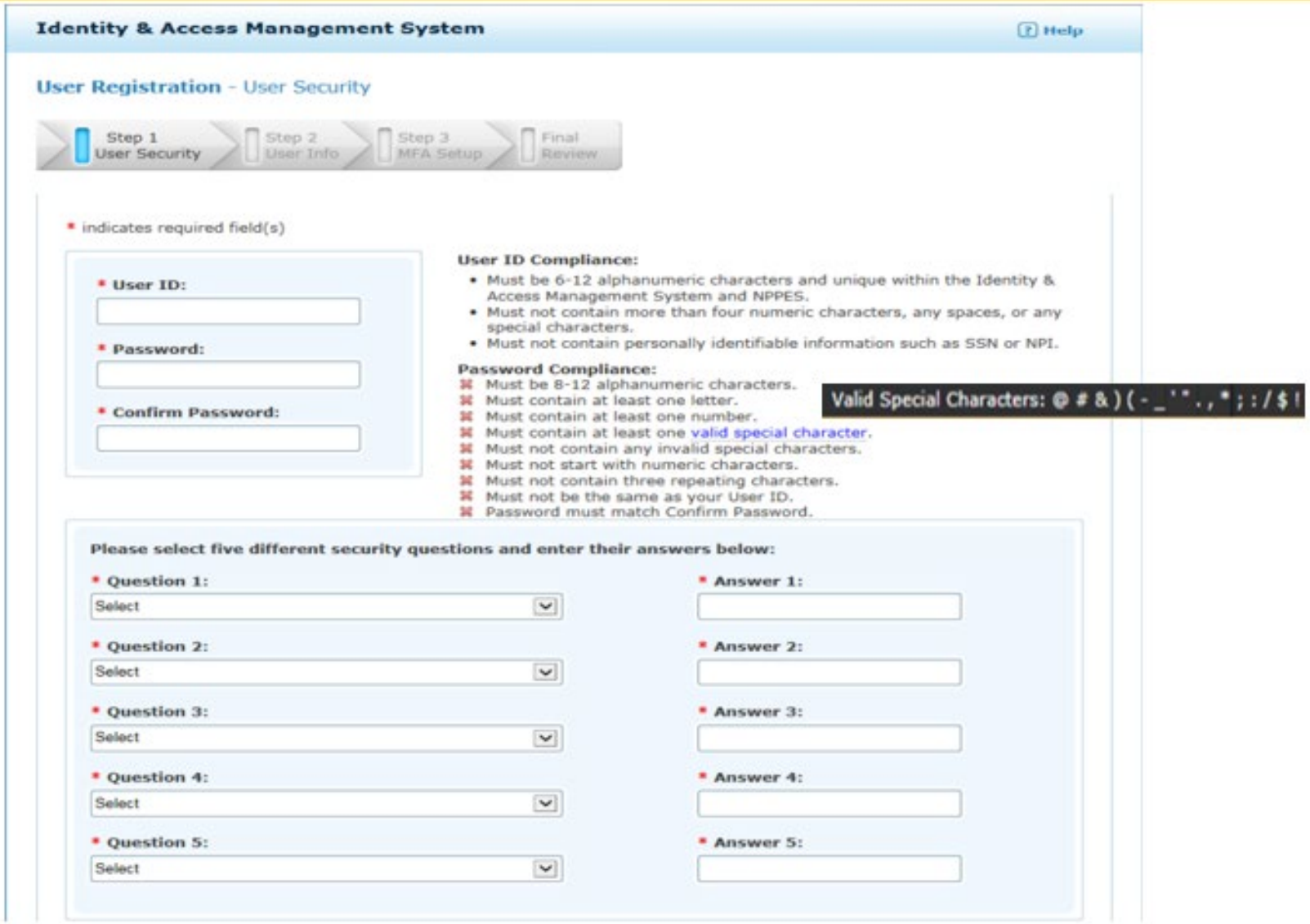
Create Your Account

Create Account Now

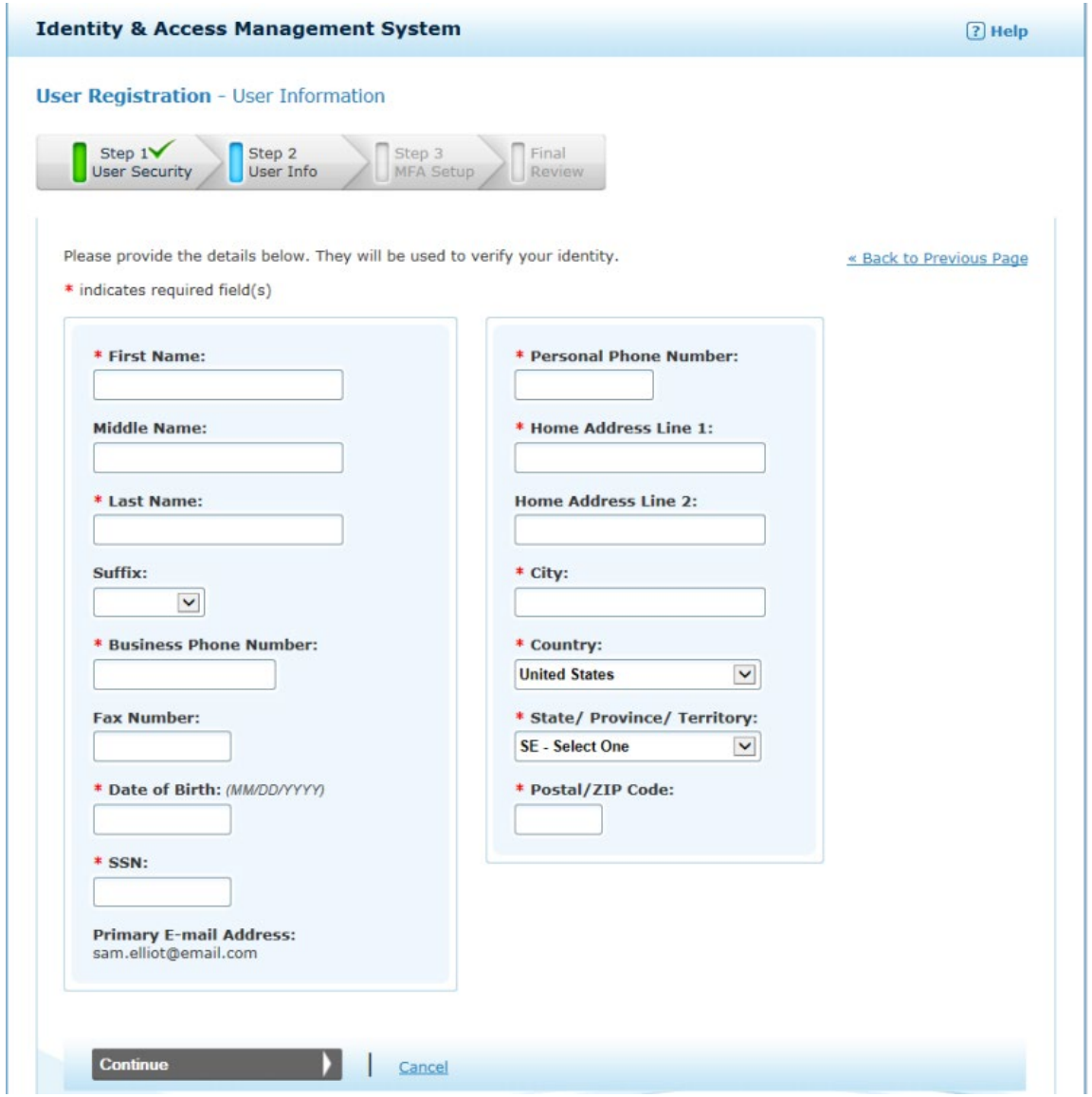
User Registration



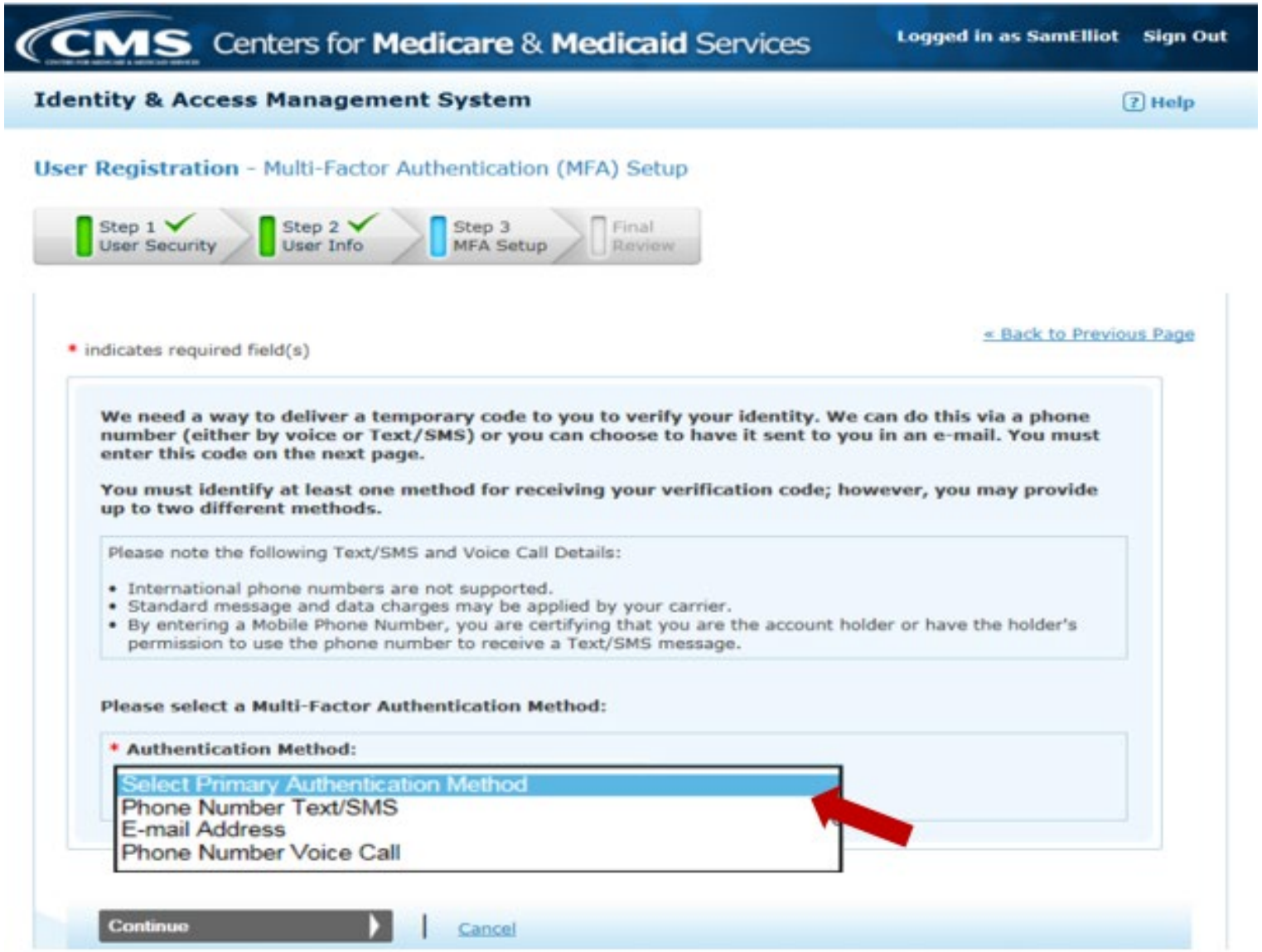
User Security



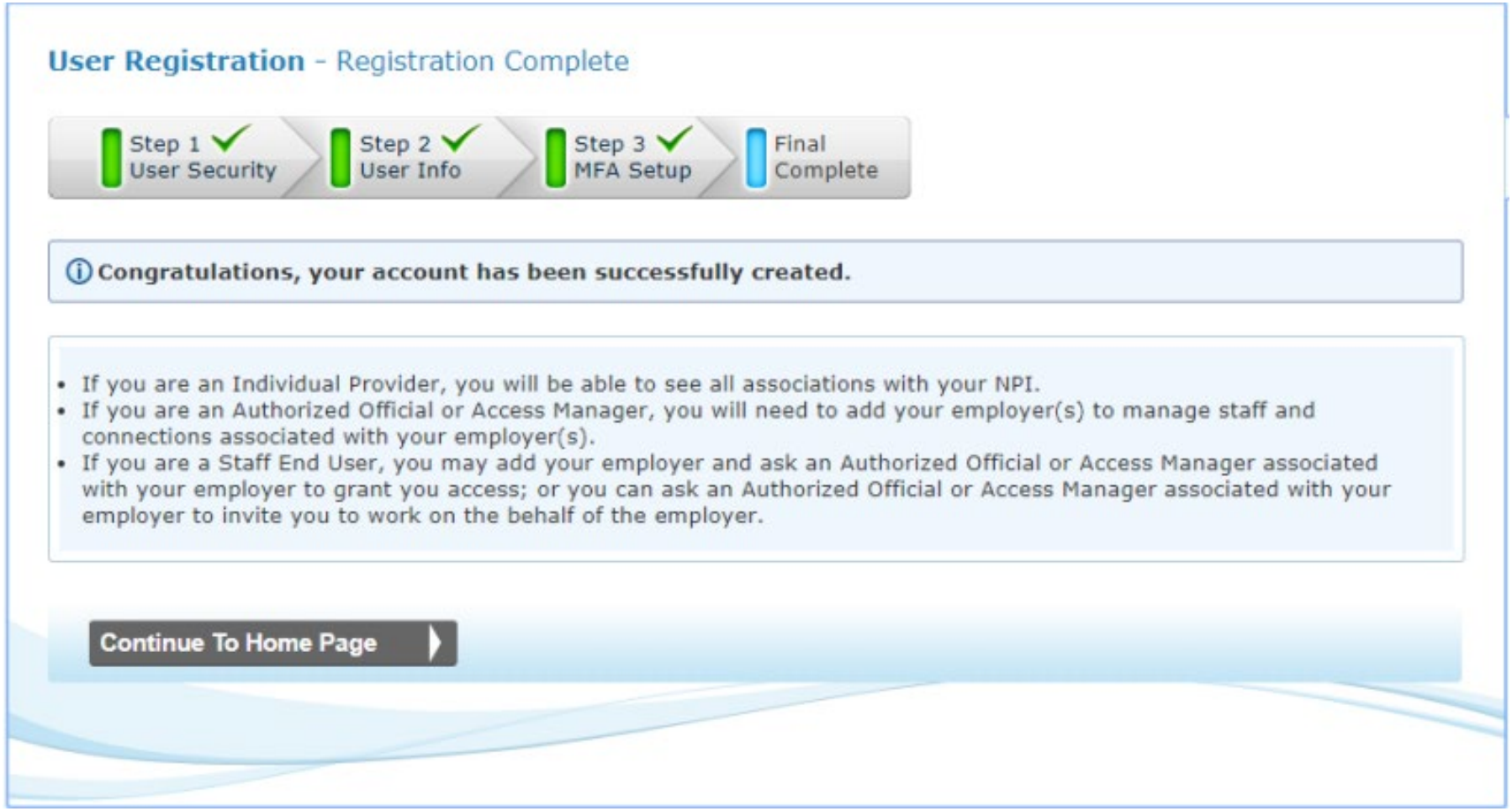
User Information



Multi-Factor Authentication Setup



Registration Complete

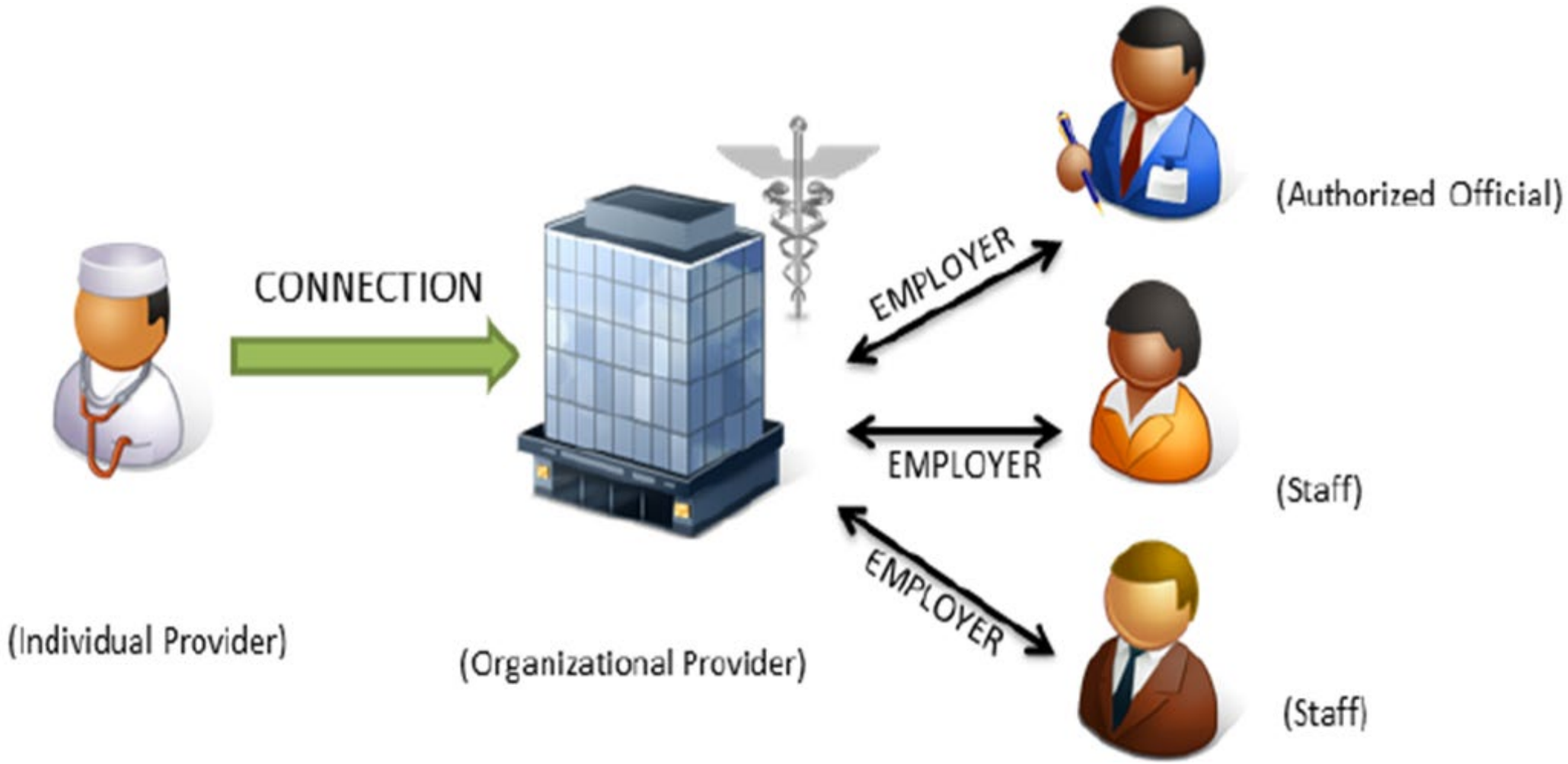


Register as an AO, AM or Staff End User for Your Employer

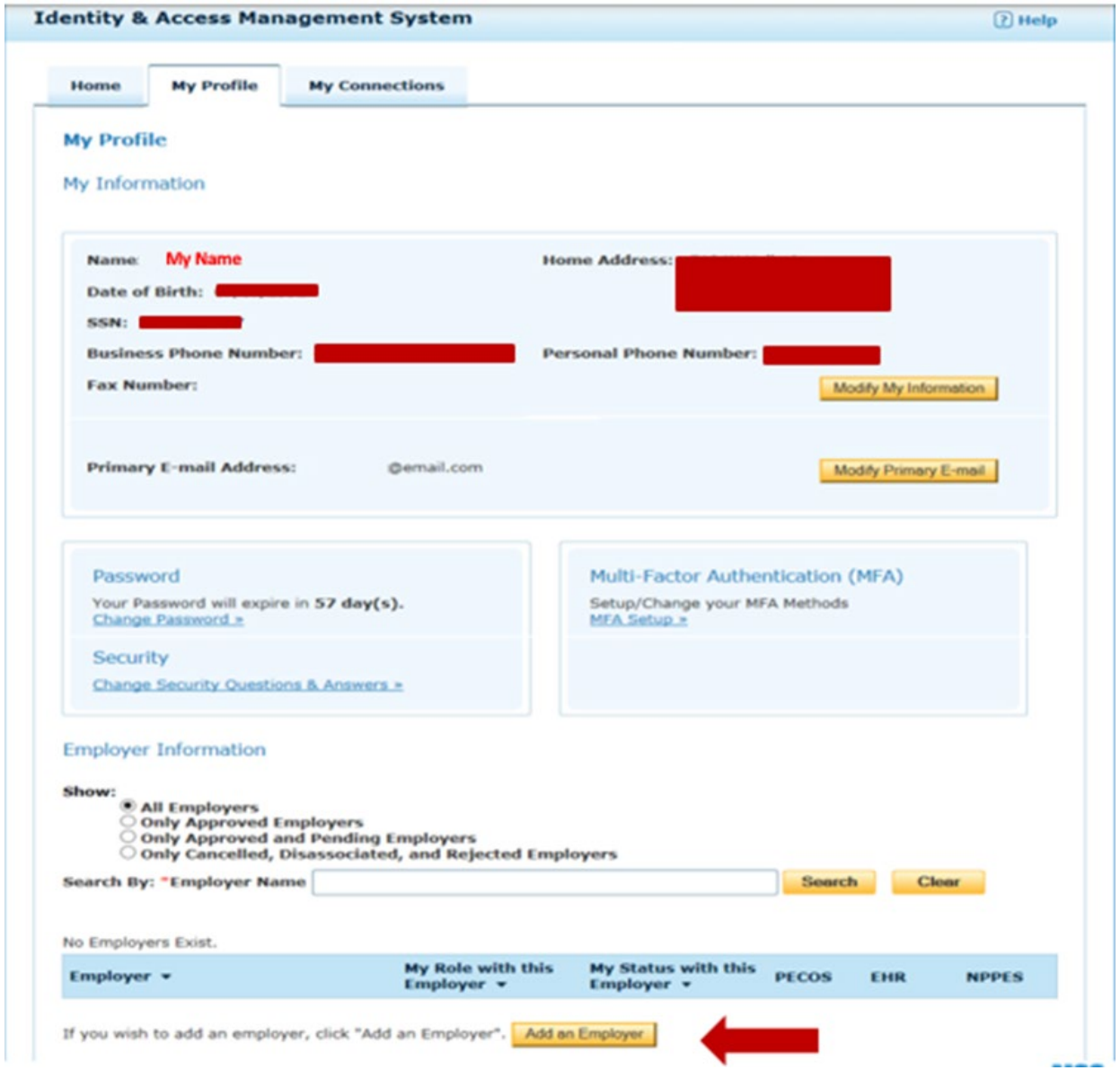
Roles

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

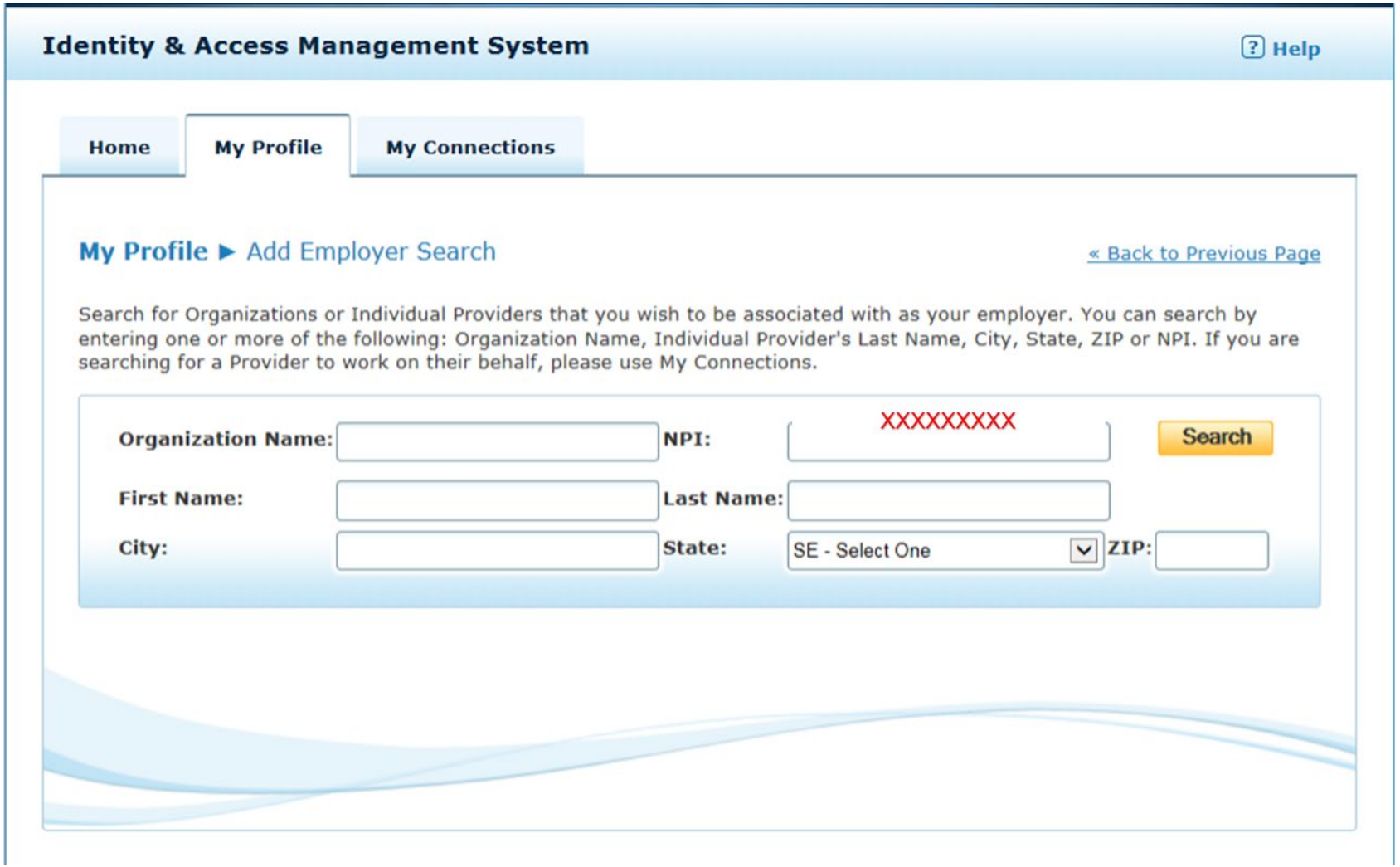
Roles and Relationships



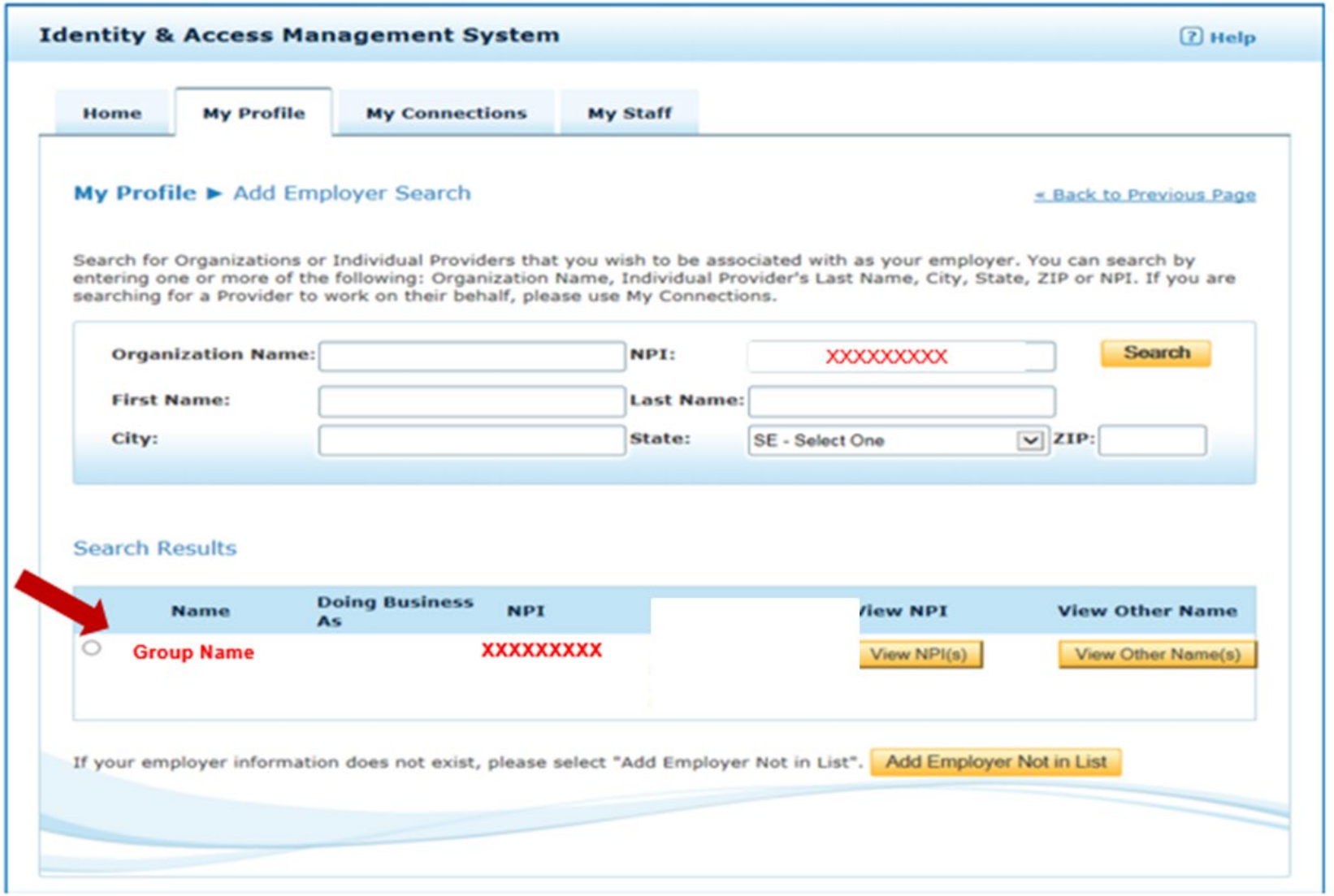
Register With Employer



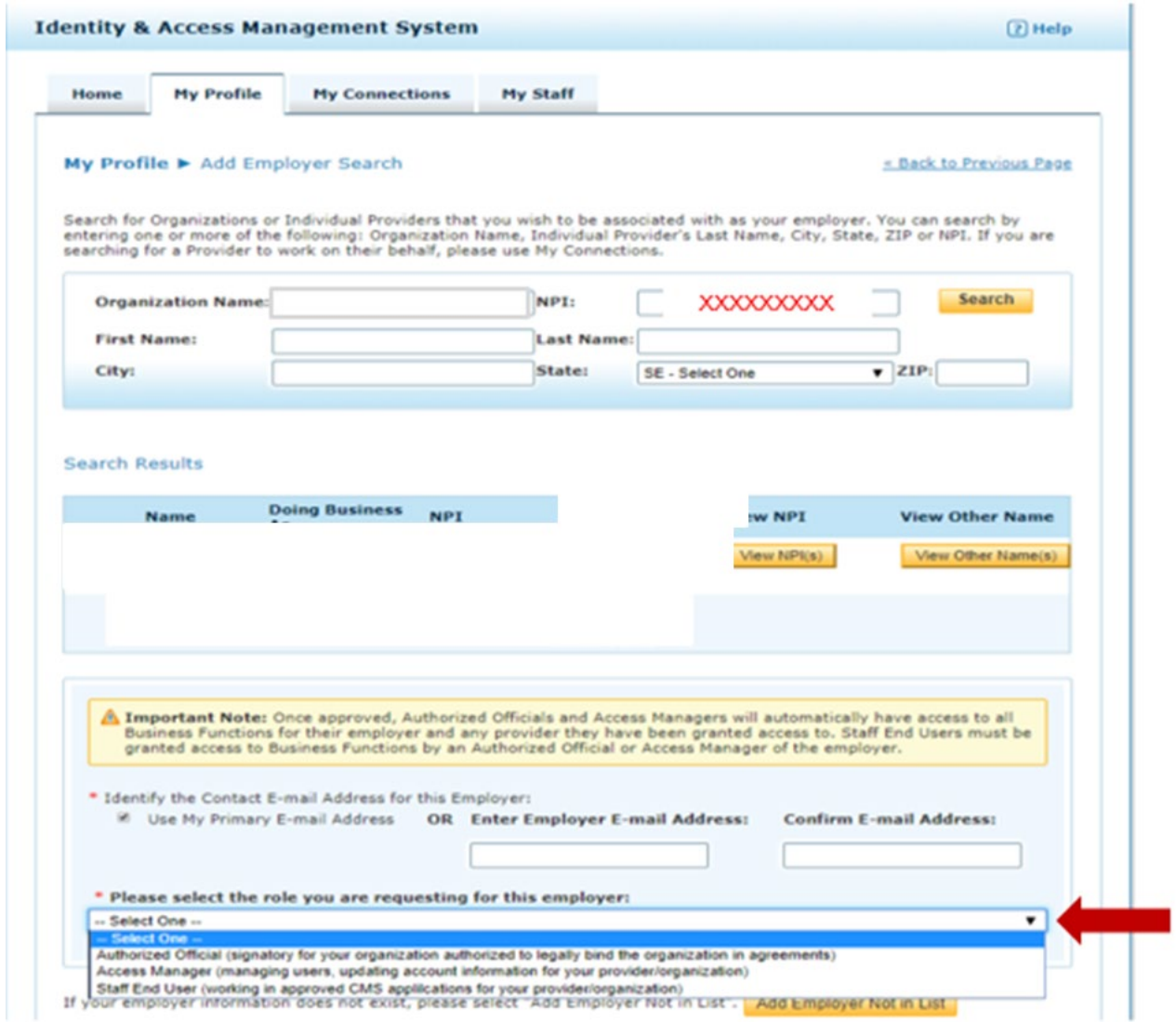
Search on an NPI



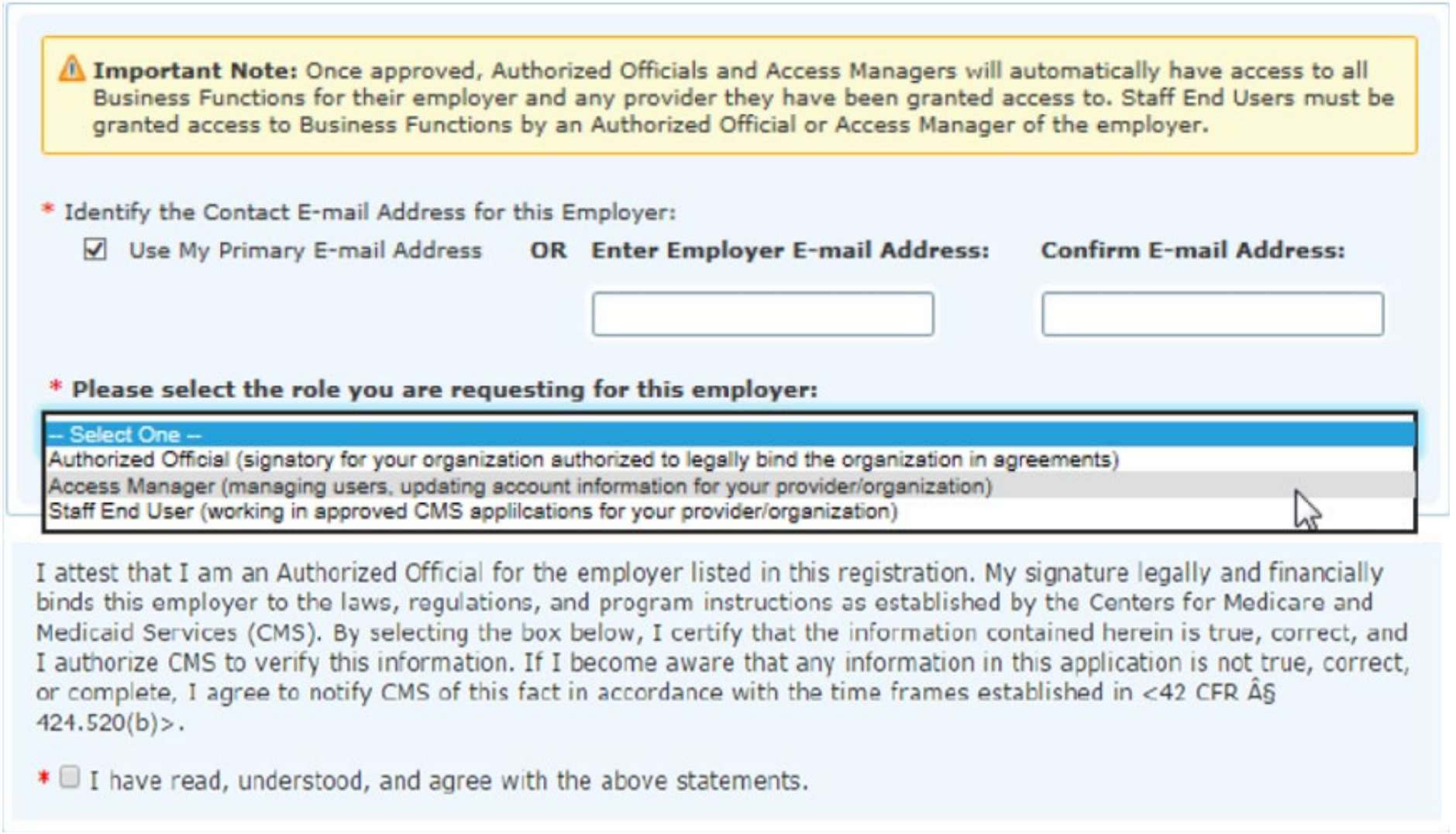
Search Results



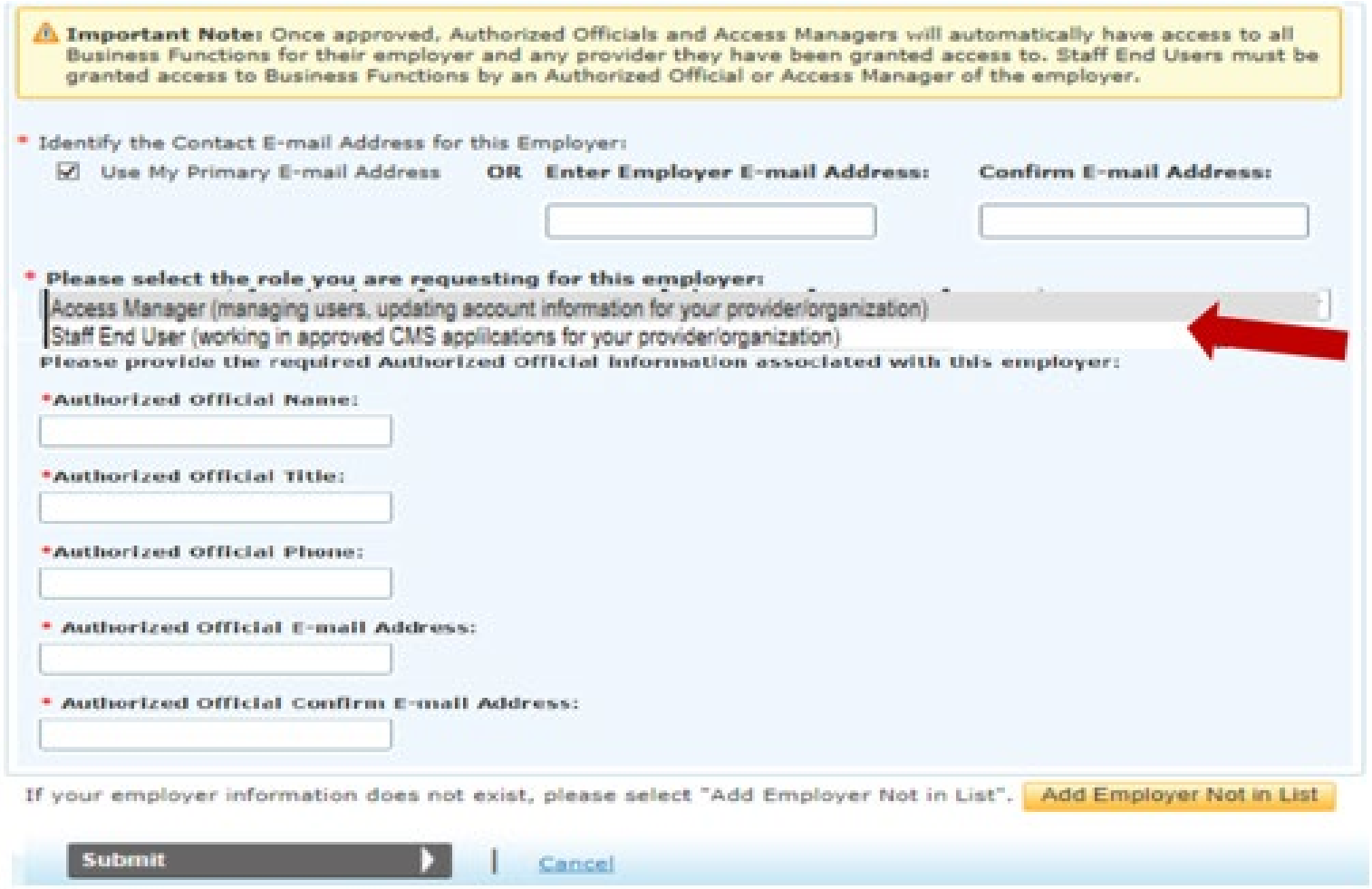
Select Role


Identity & Access Management System
Help
Home
My Profile
My Connections
My Staff
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:
NPI:
XXXXXXXXX
Search
First Name:
Last Name:
City:
State:
SE - Select One
ZIP:
Search Results
Name
Doing Business
NPI
View NPI
View Other Name
View NPI(s)
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".
Add Employer Not in List

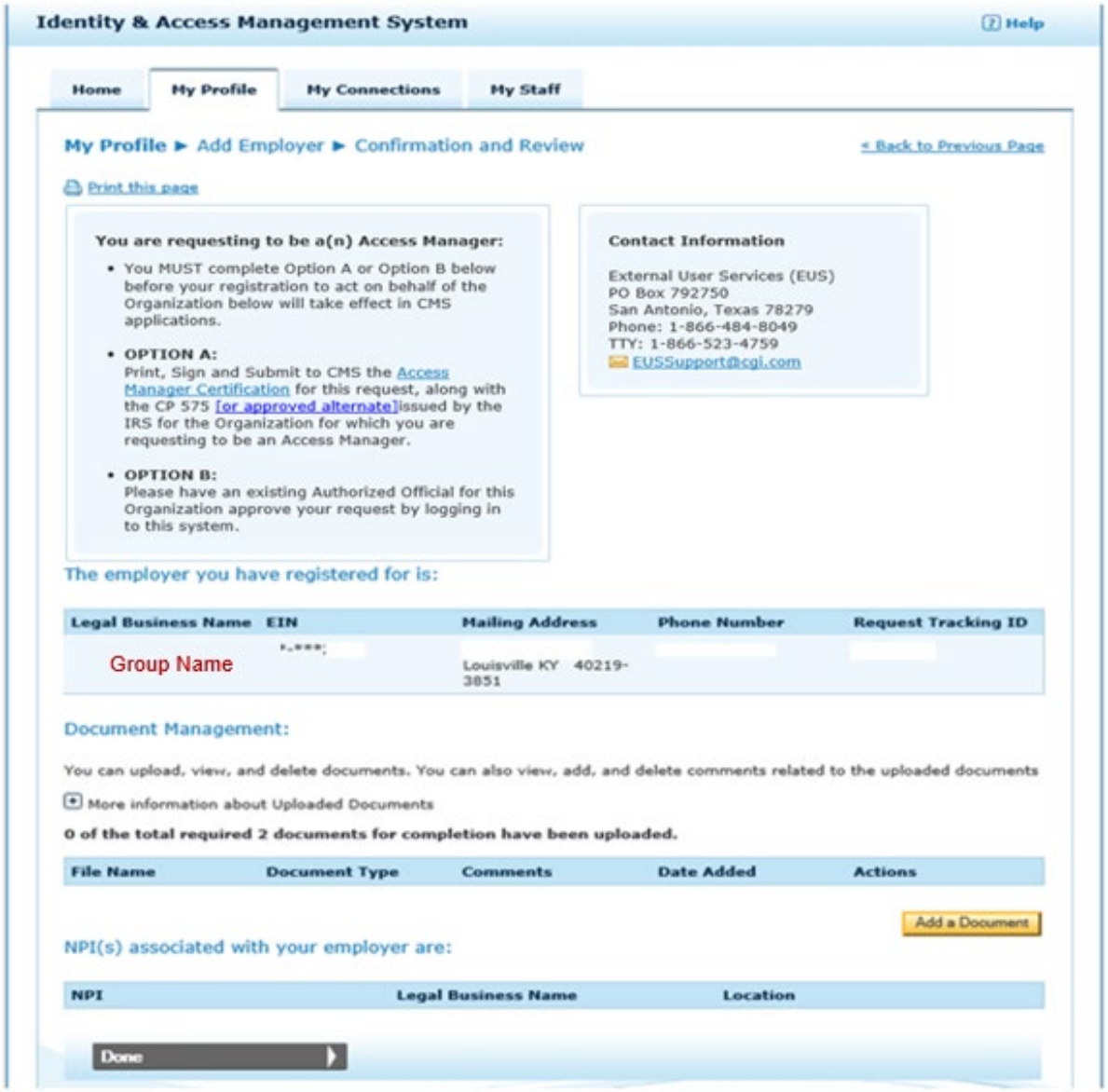
Authorized Official or Access Manager



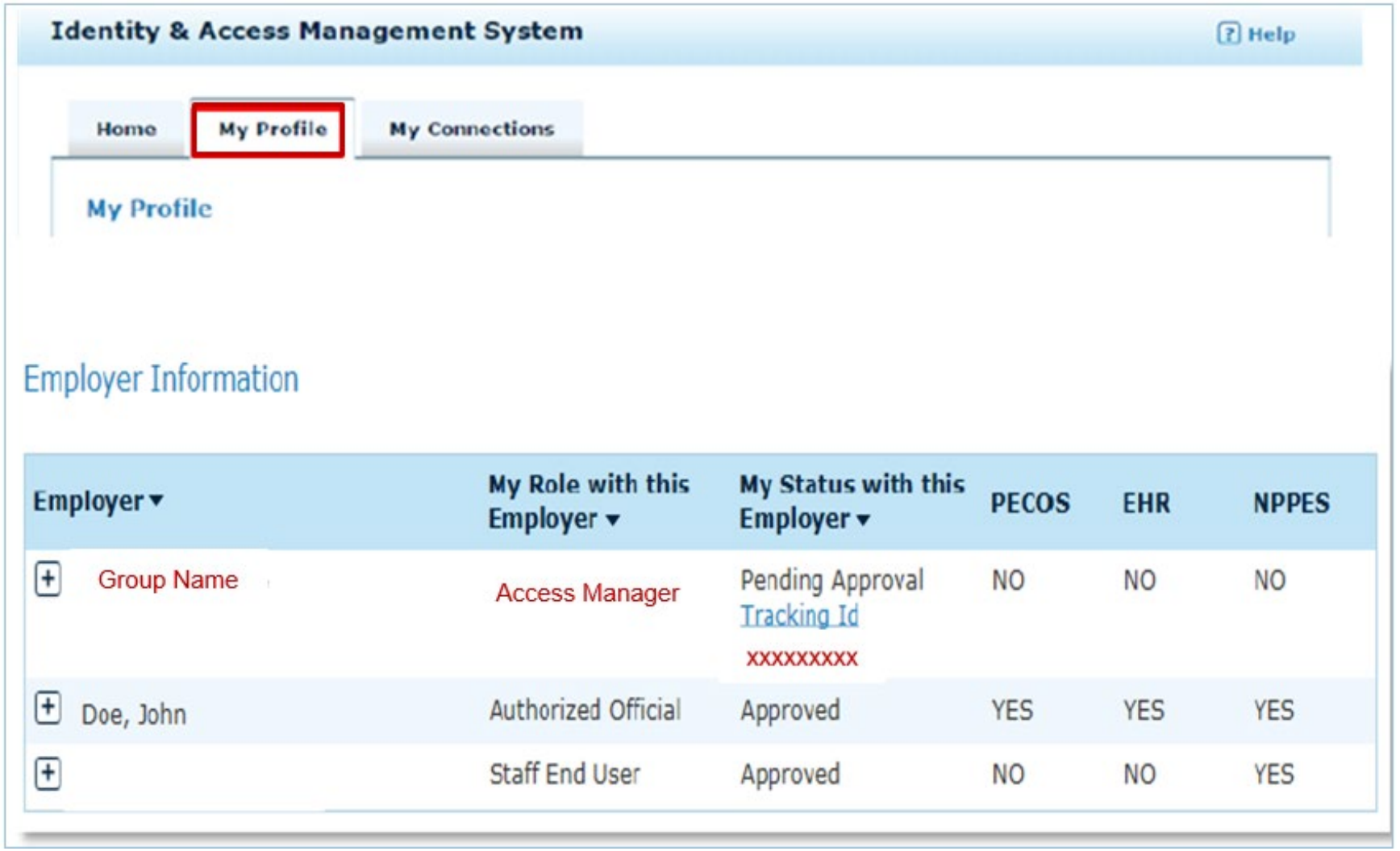
Access Manager or Staff End User



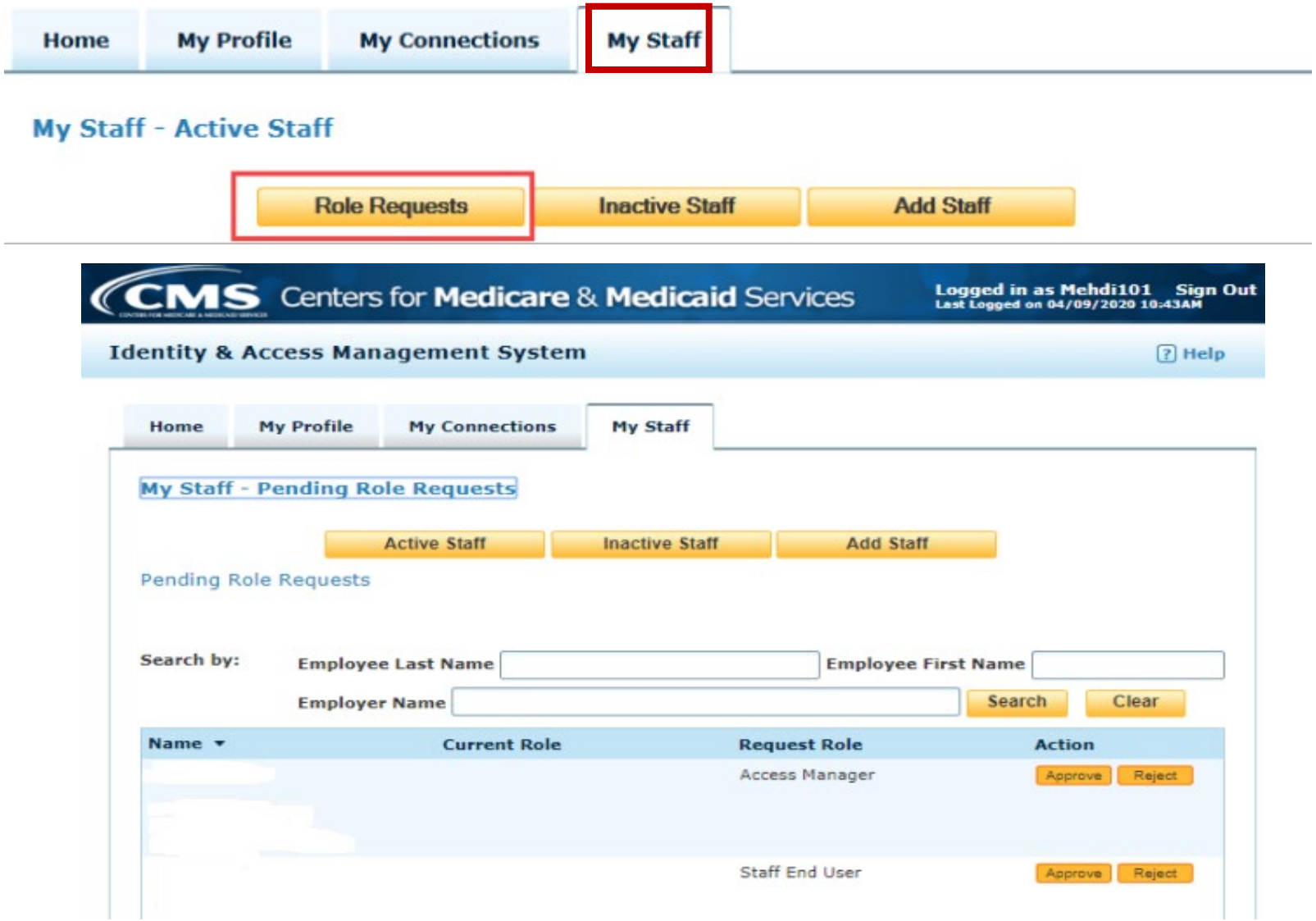
Confirmation and Review



Employer Information

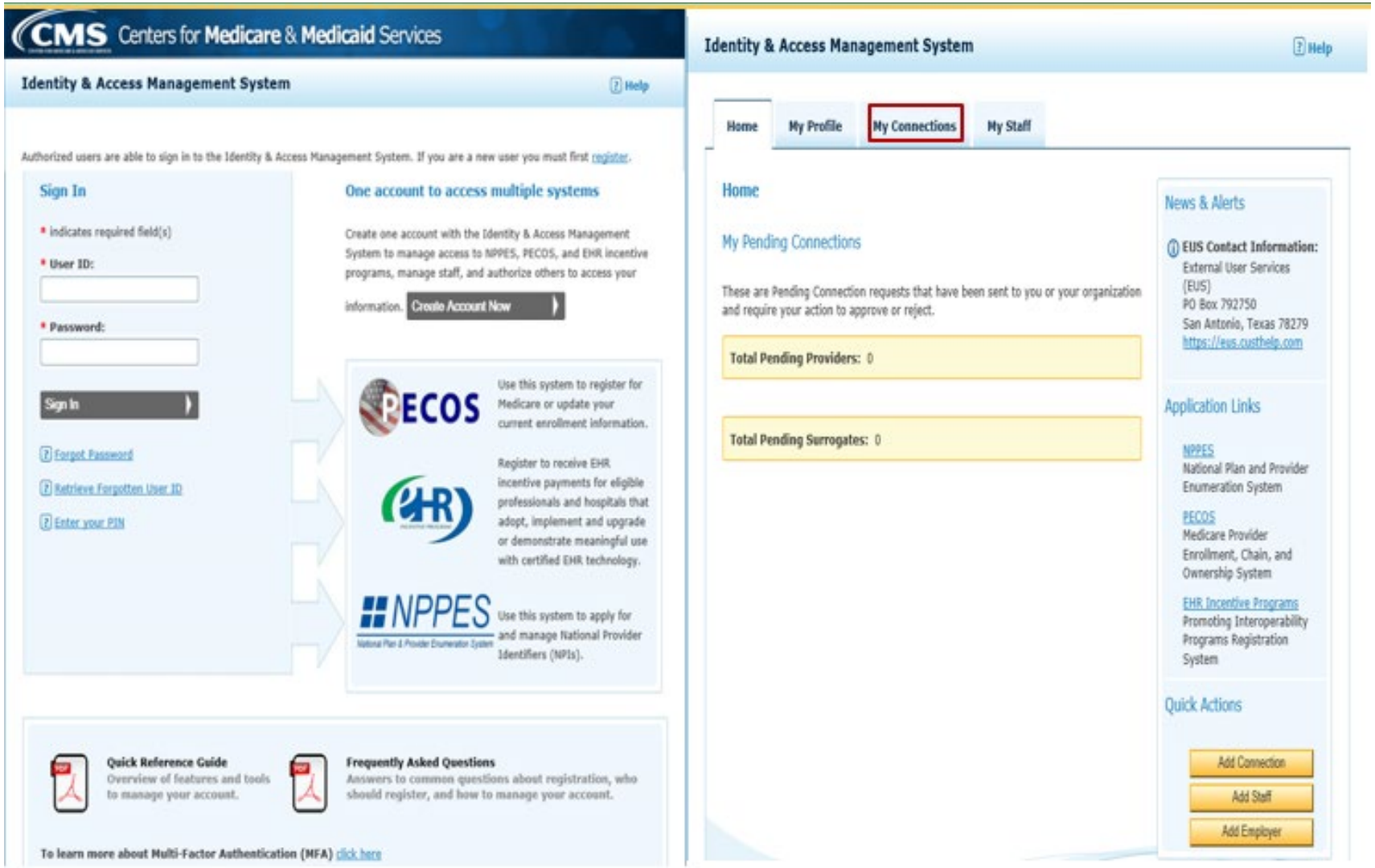


AO Role Request Approval

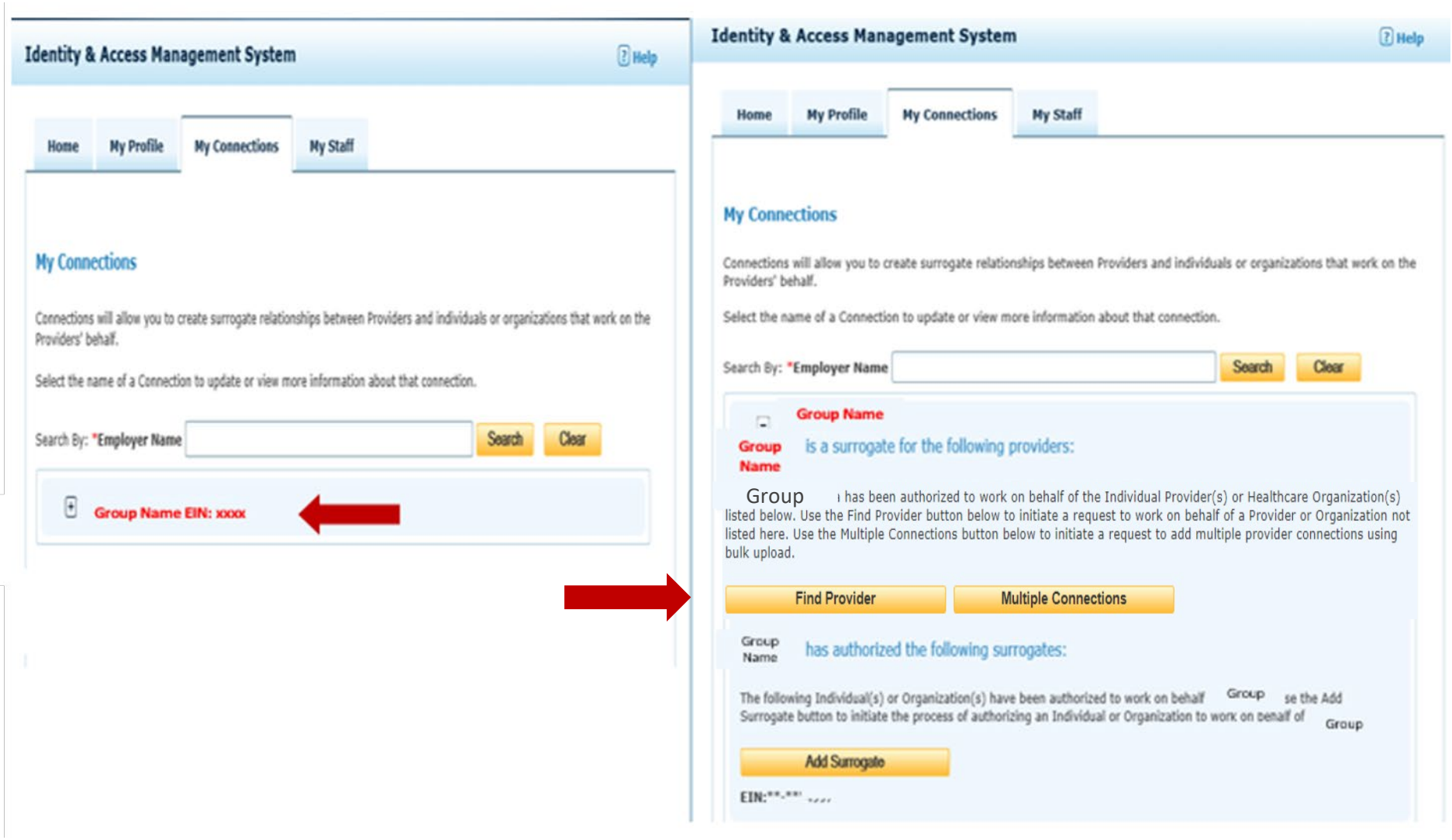


Initiate a Connection Request to a Provider

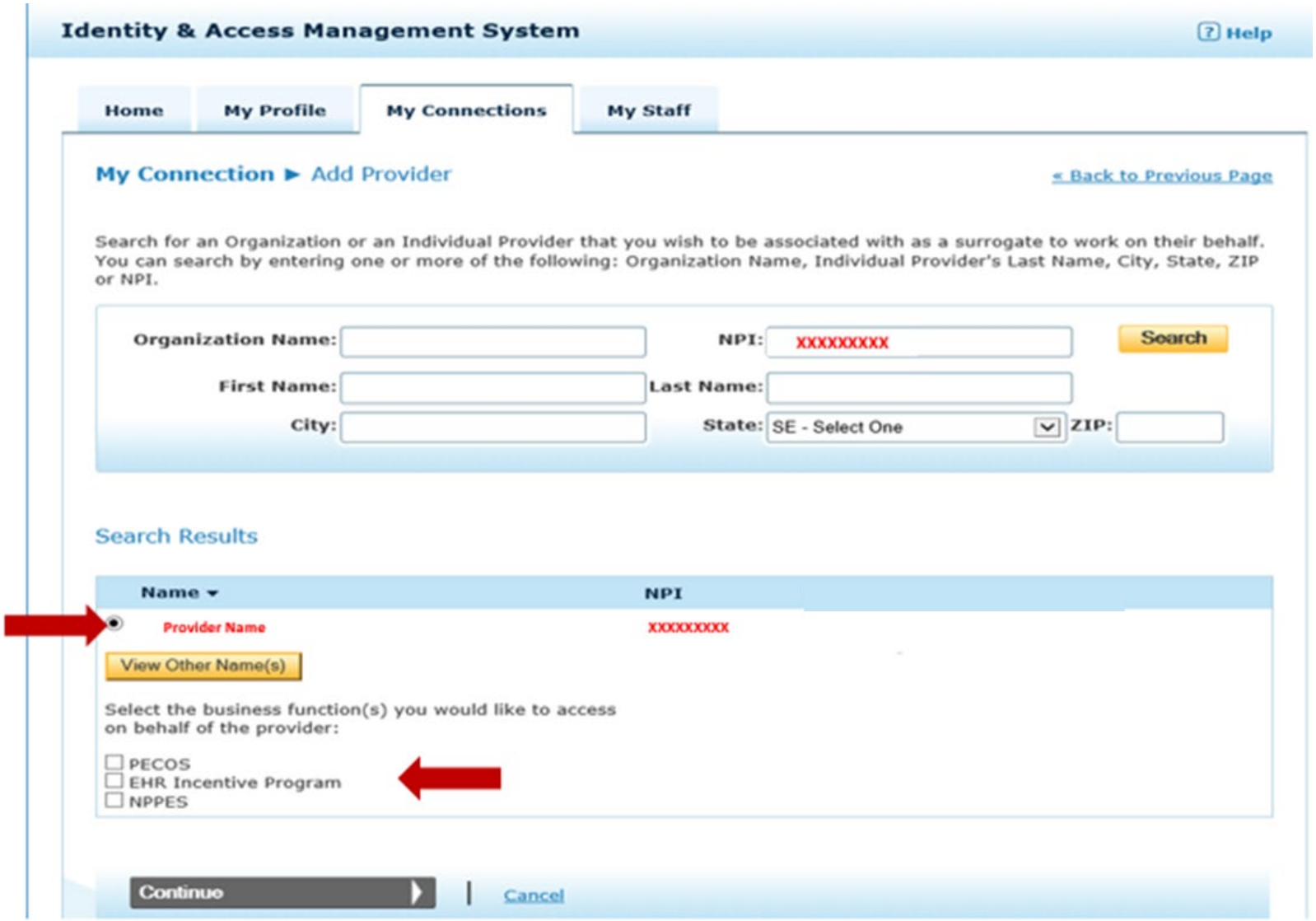
My Connection Tab



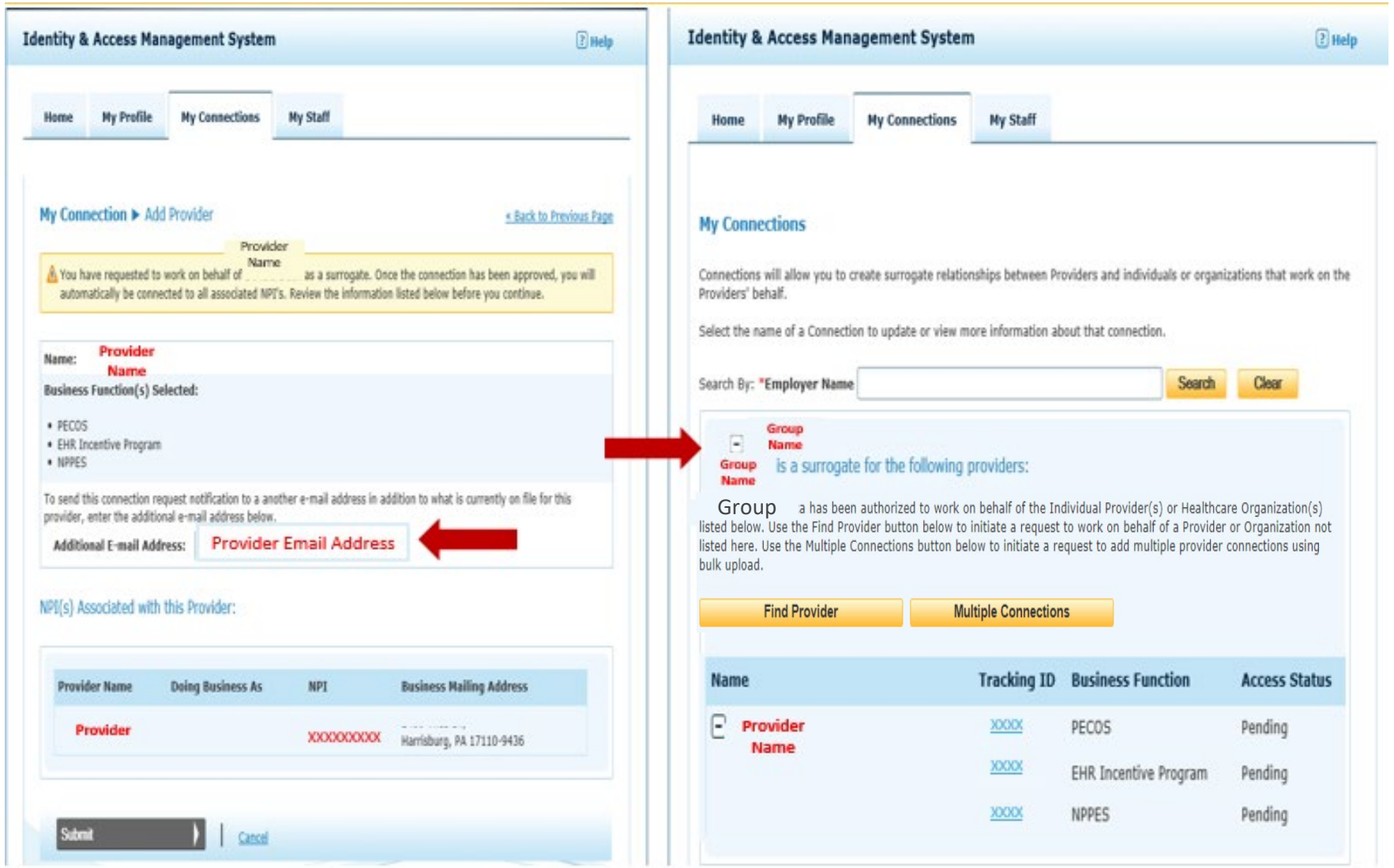
Find Provider



Search for a Provider

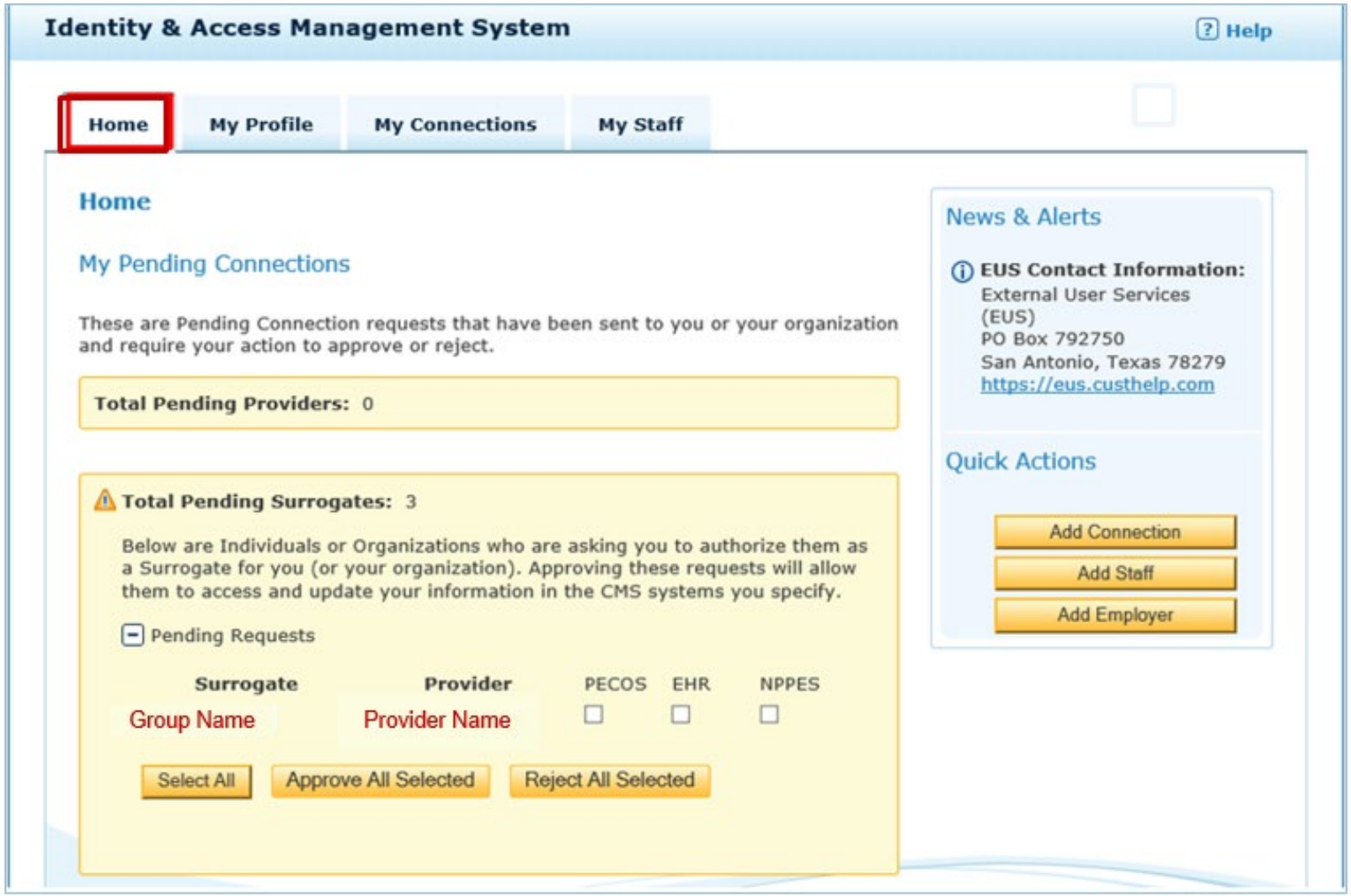


Submit and Review for a Provider



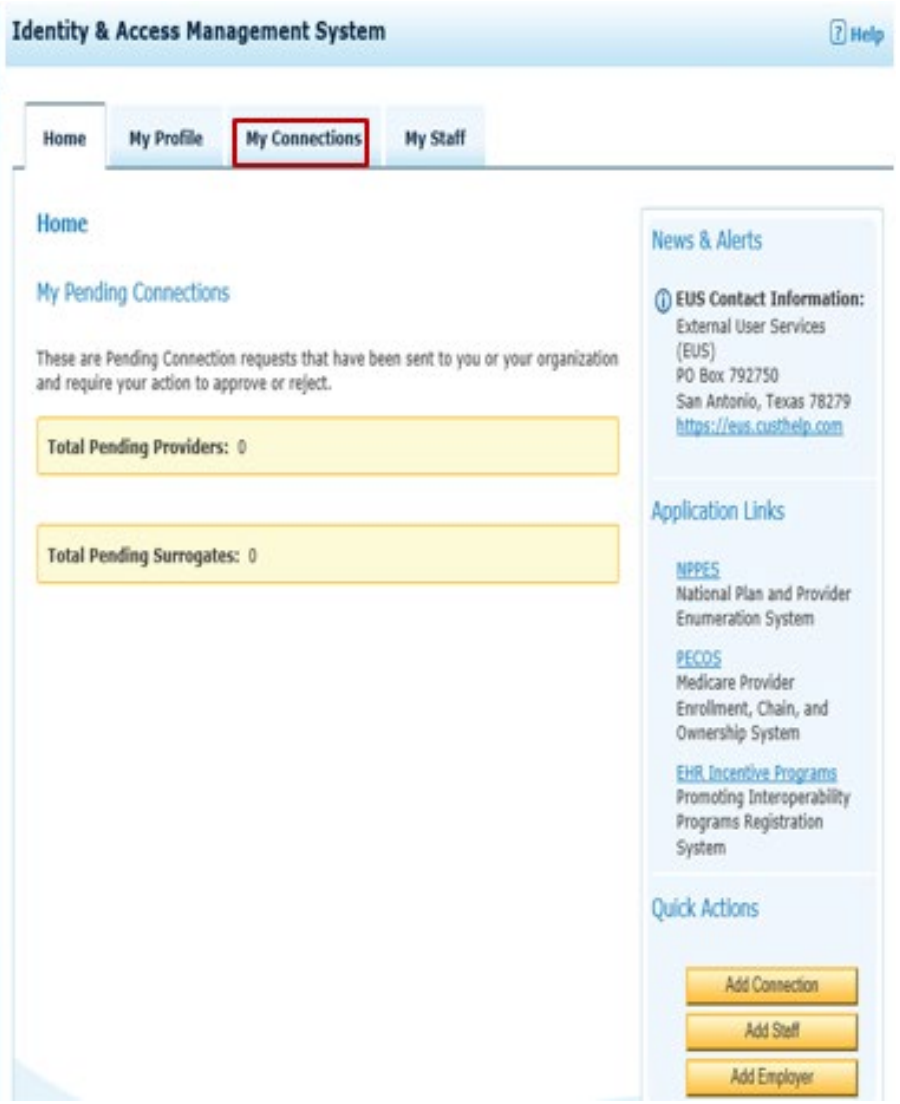
Approve connection request by provider

Home Tab

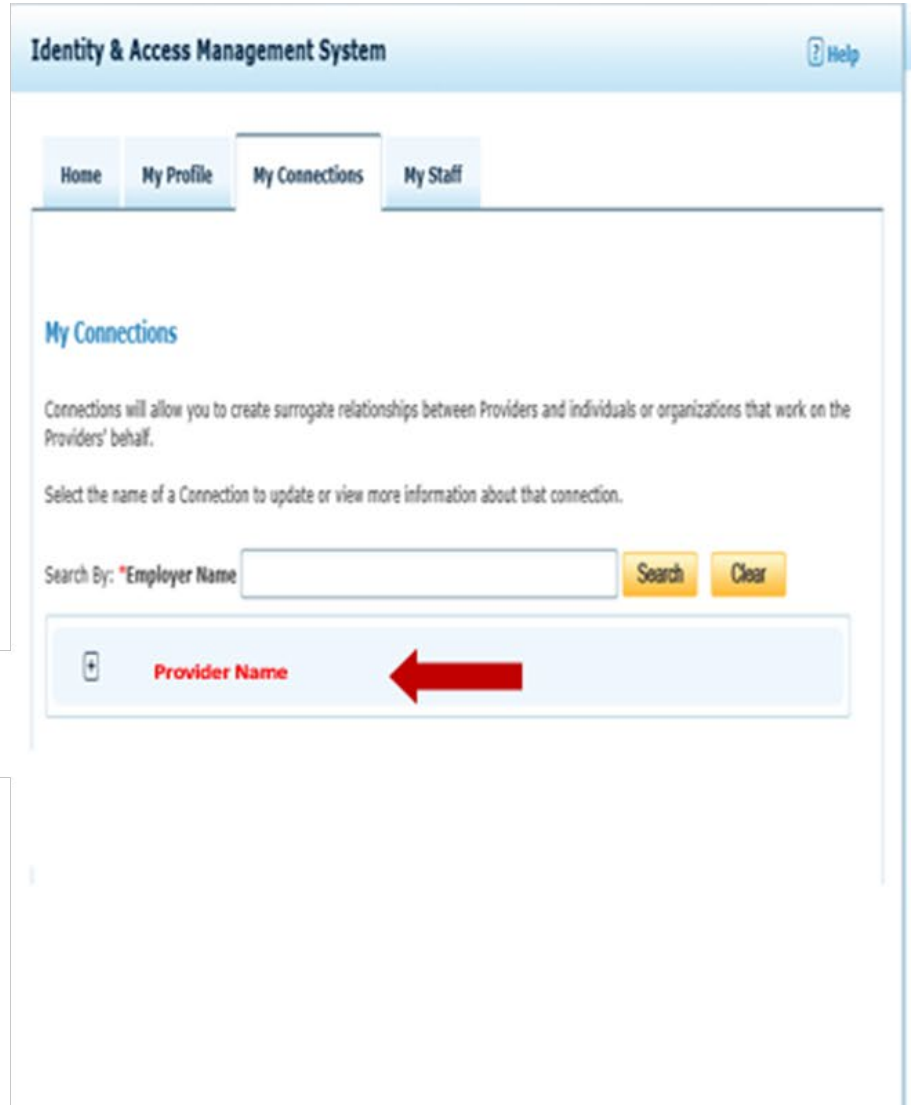


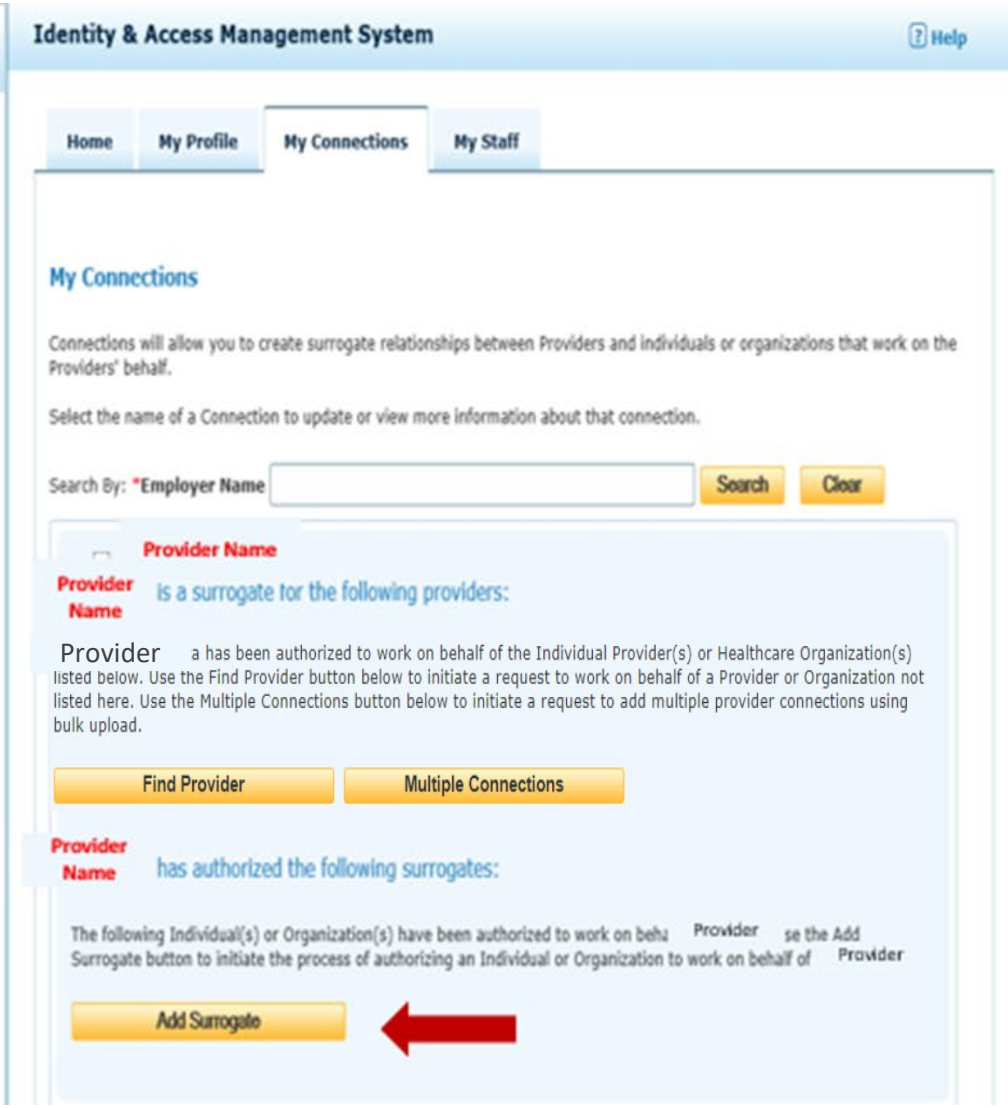
Initiate a Connection Request to a Group/Entity

My Connection Tab – Individual Provider

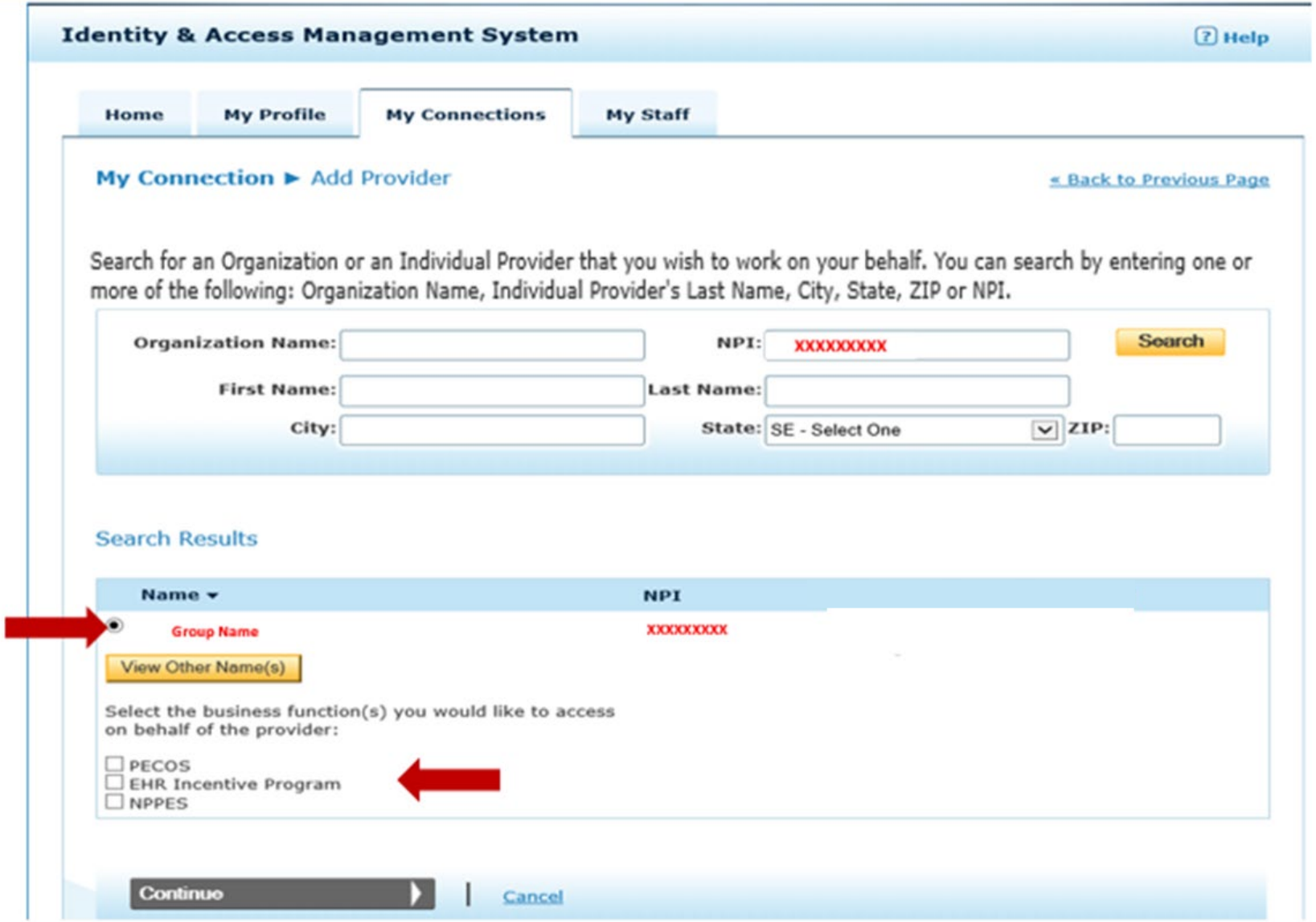


Add Surrogate

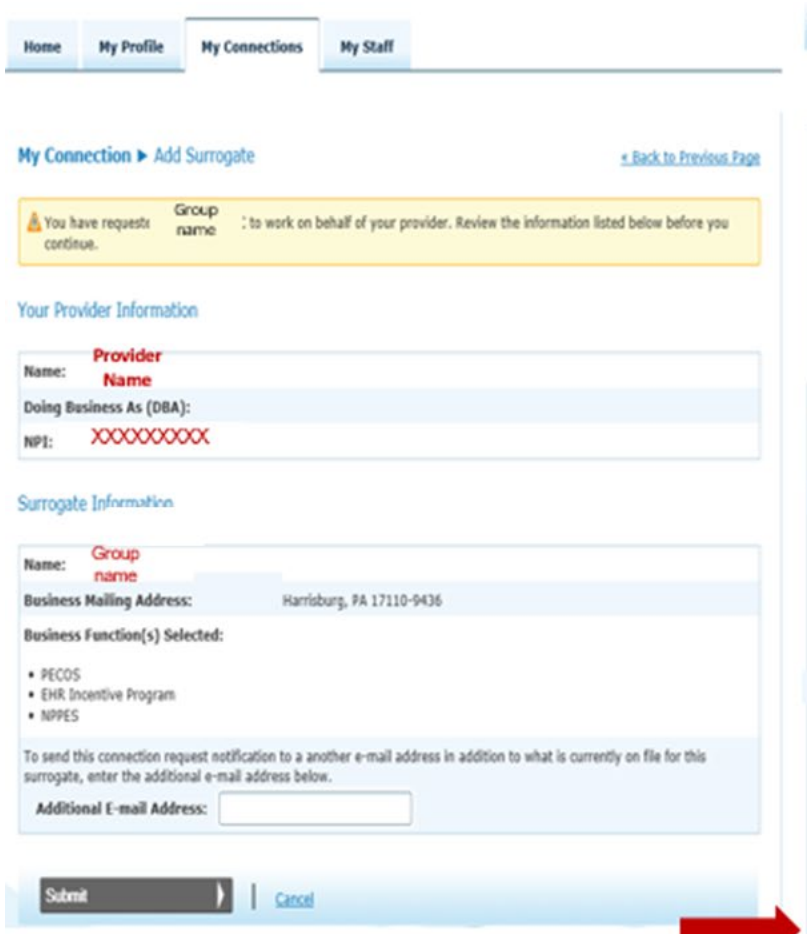


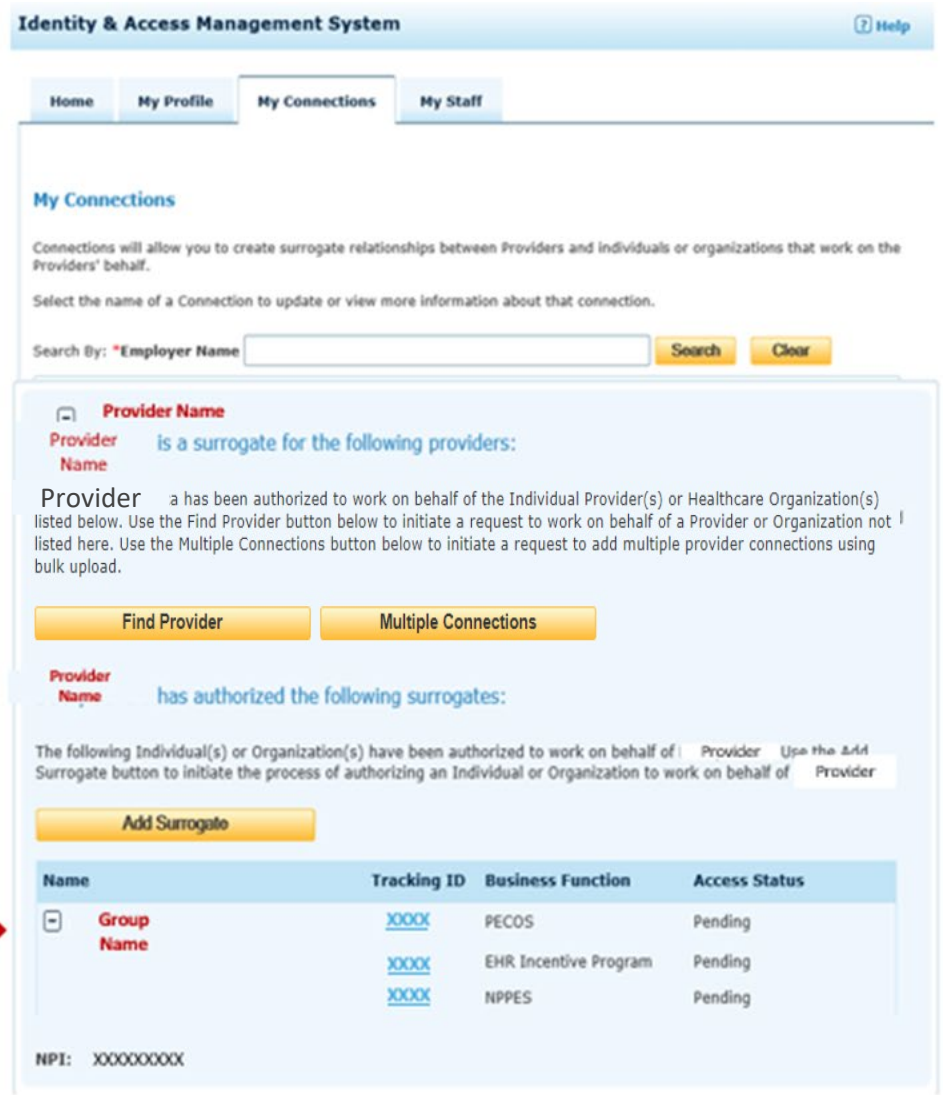


Search for a Group



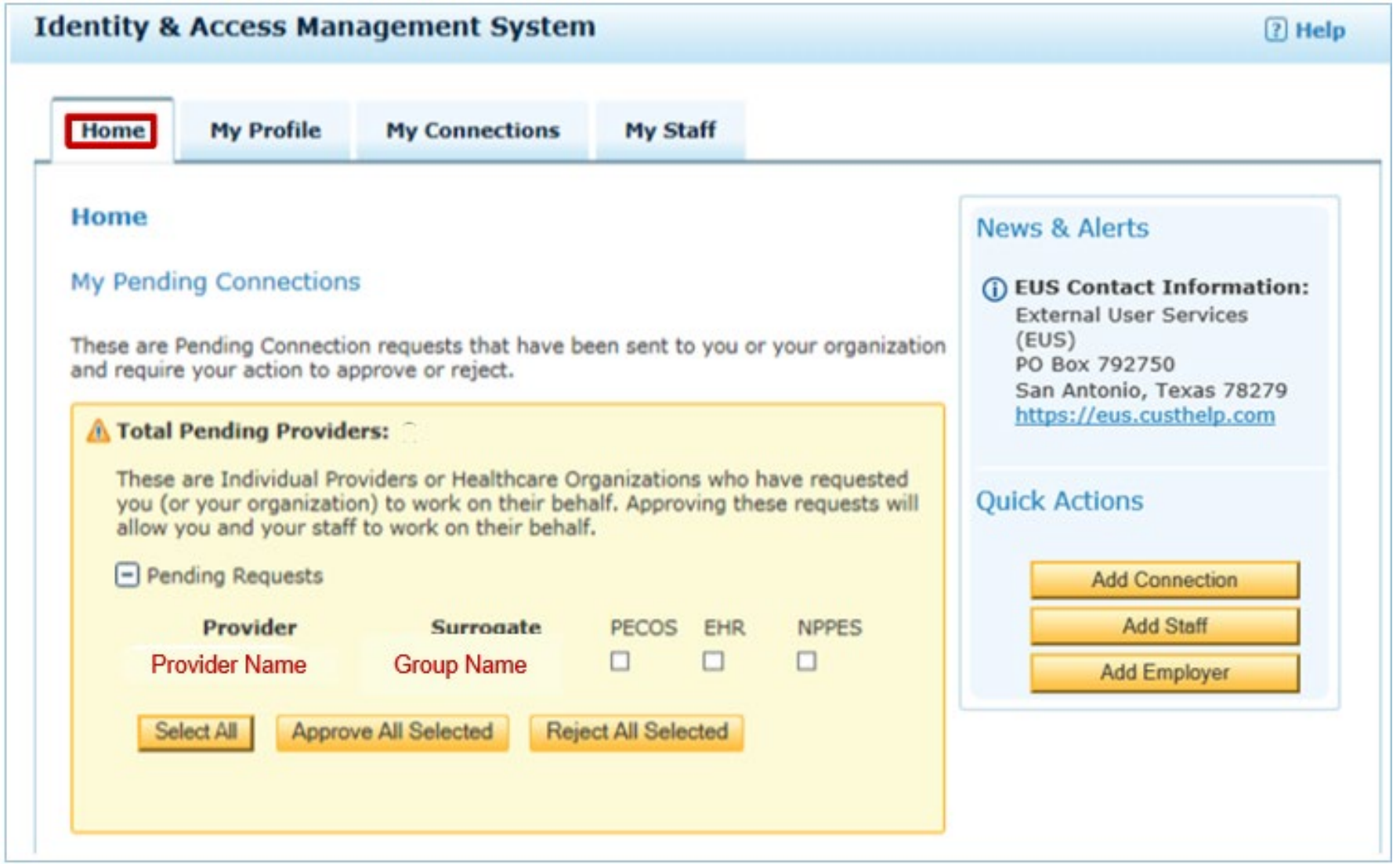
Submit and Review for a Group





Approval connection request by AO/AM

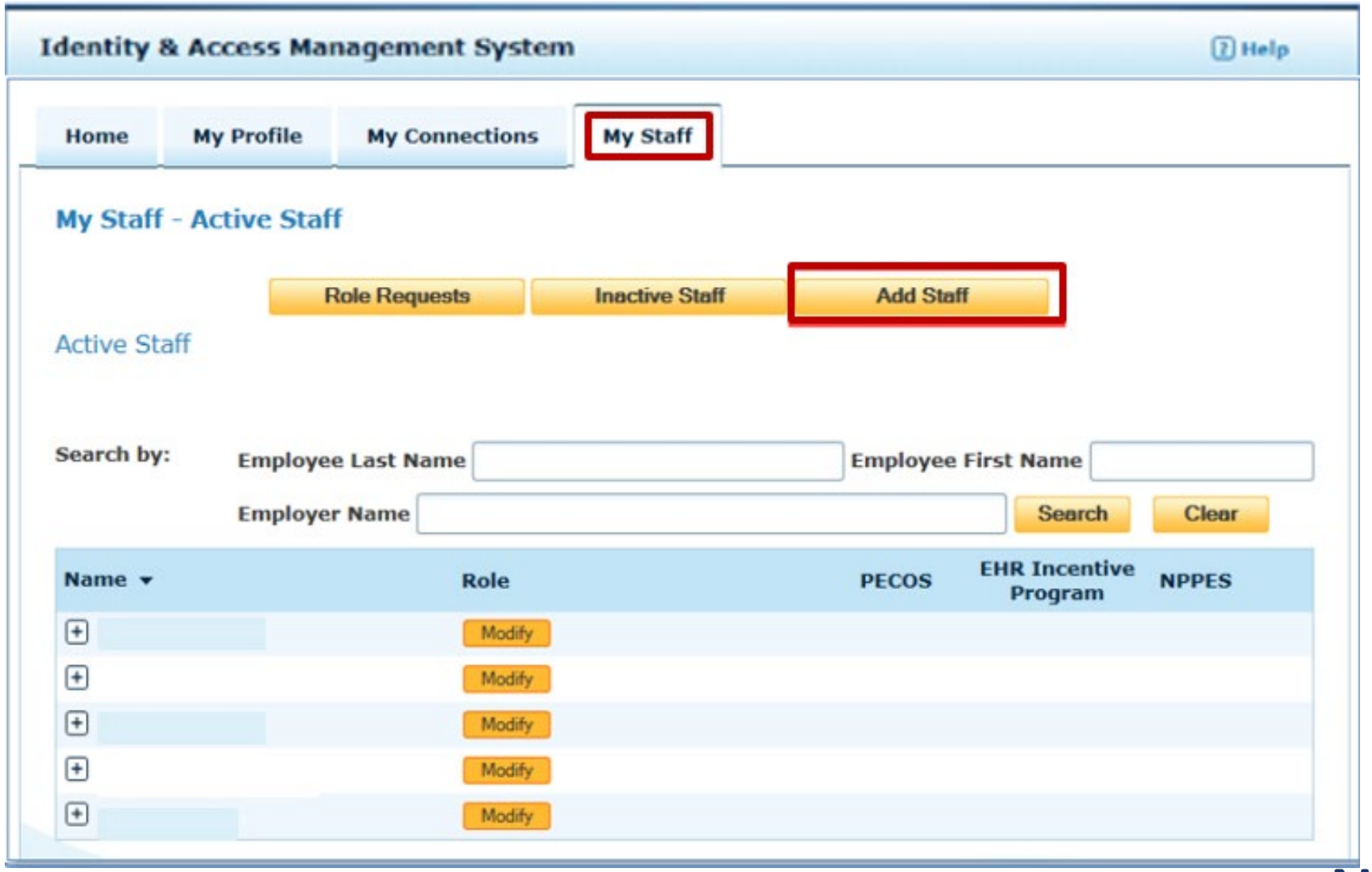
Home Tab



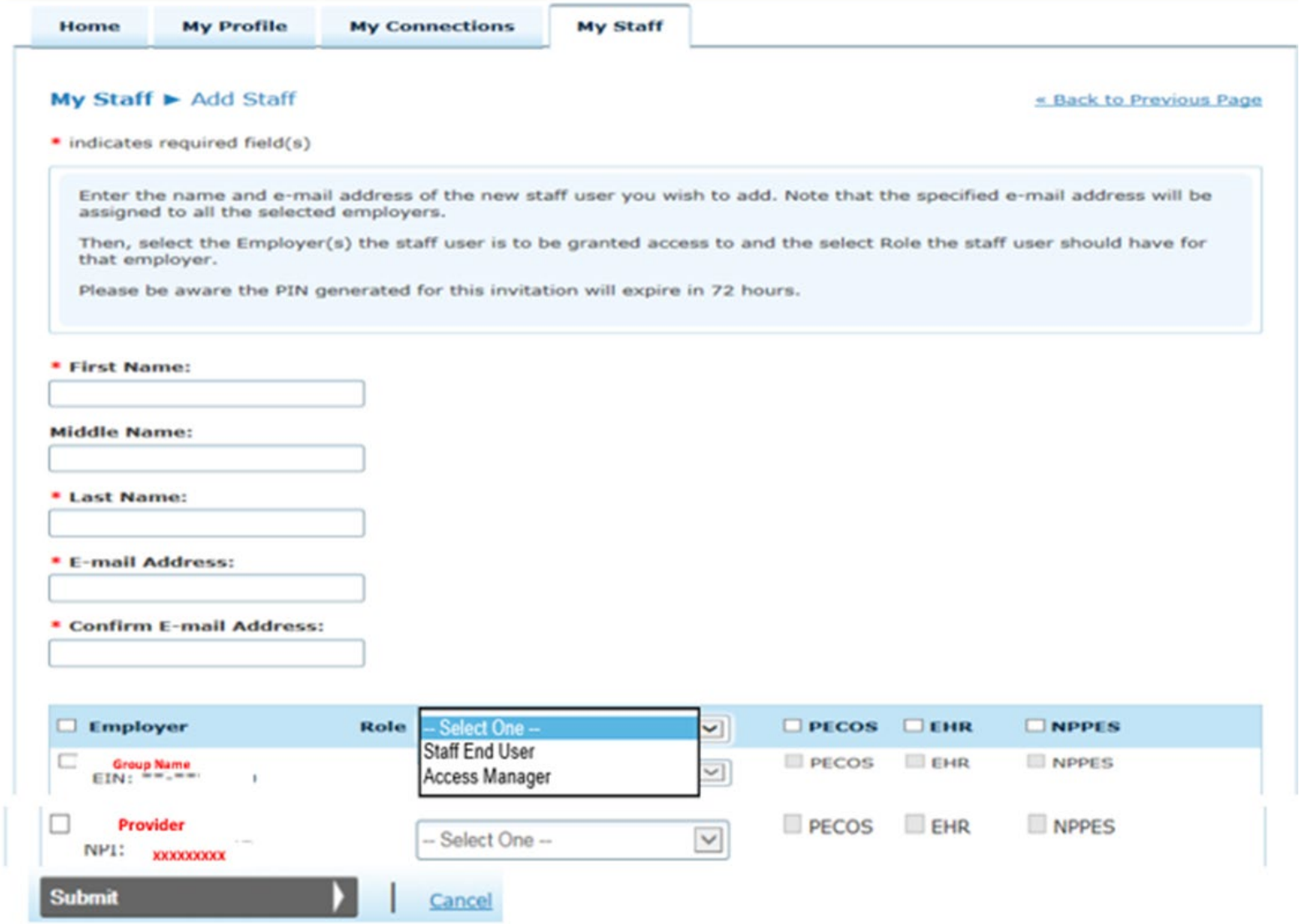
Manage Your Employees and Their Access

Add/Modify Staff, Approve Role Requests

My Staff Tab



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 the 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:
Employer
Role
-- Select One --
Staff End User
Access Manager
PECOS
EHR
NPPES
Group Name
EIN:
Provider
NPI:
xxxxxxxxx
-- Select One --
Submit
Cancel

Approval By Staff

Fro 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

PIN: XXXXXXXXX

Invitation Tracking ID: XXXX

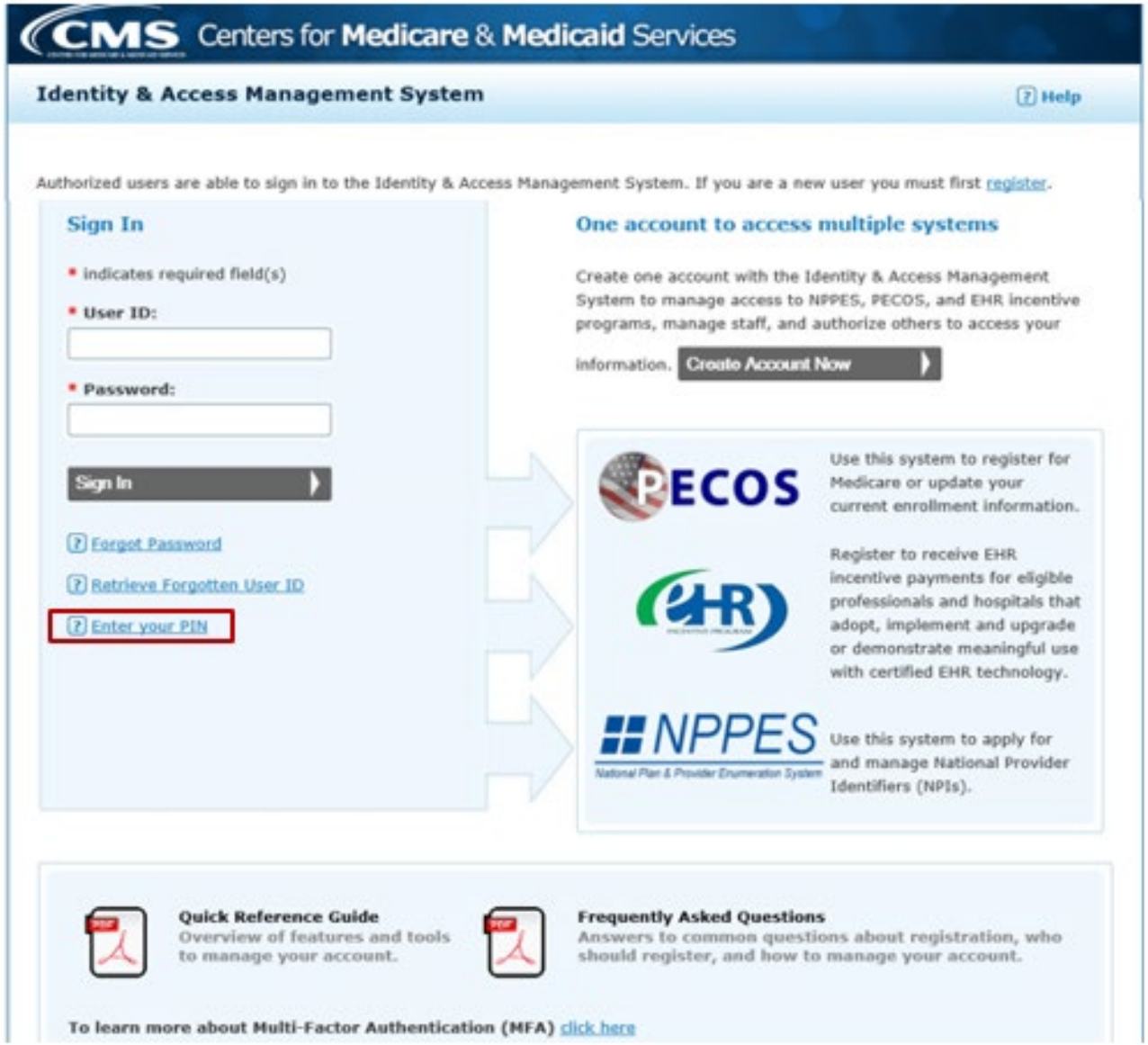
Systems that currently accept I&A log in credentials:
Internet-based PECOS (https://pecos.cms.hhs.gov)

EHR Incentive Program (https://ehrincentives.cms.gov)

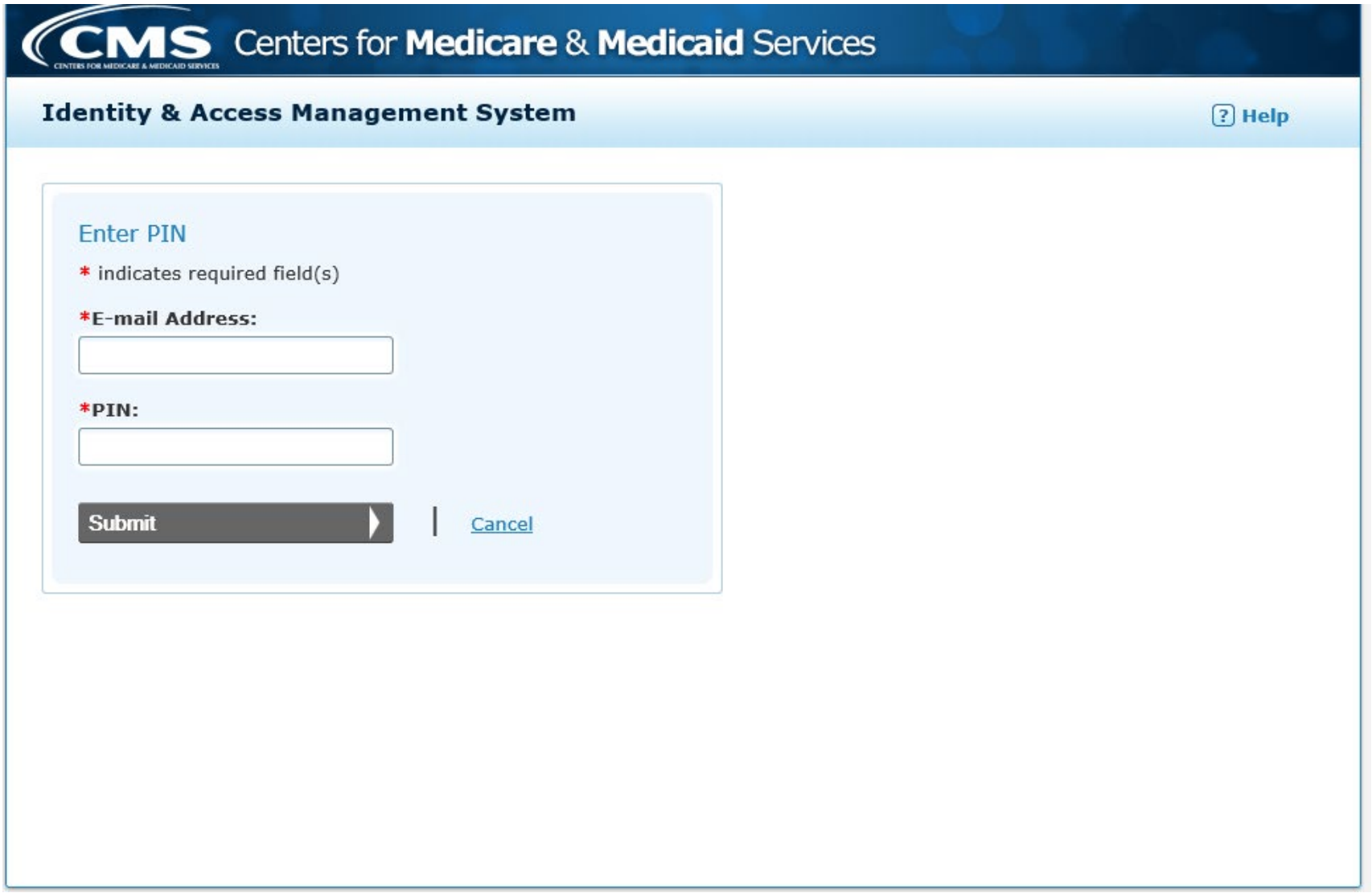
NPPES (https://nppes.cms.hhs.gov)

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

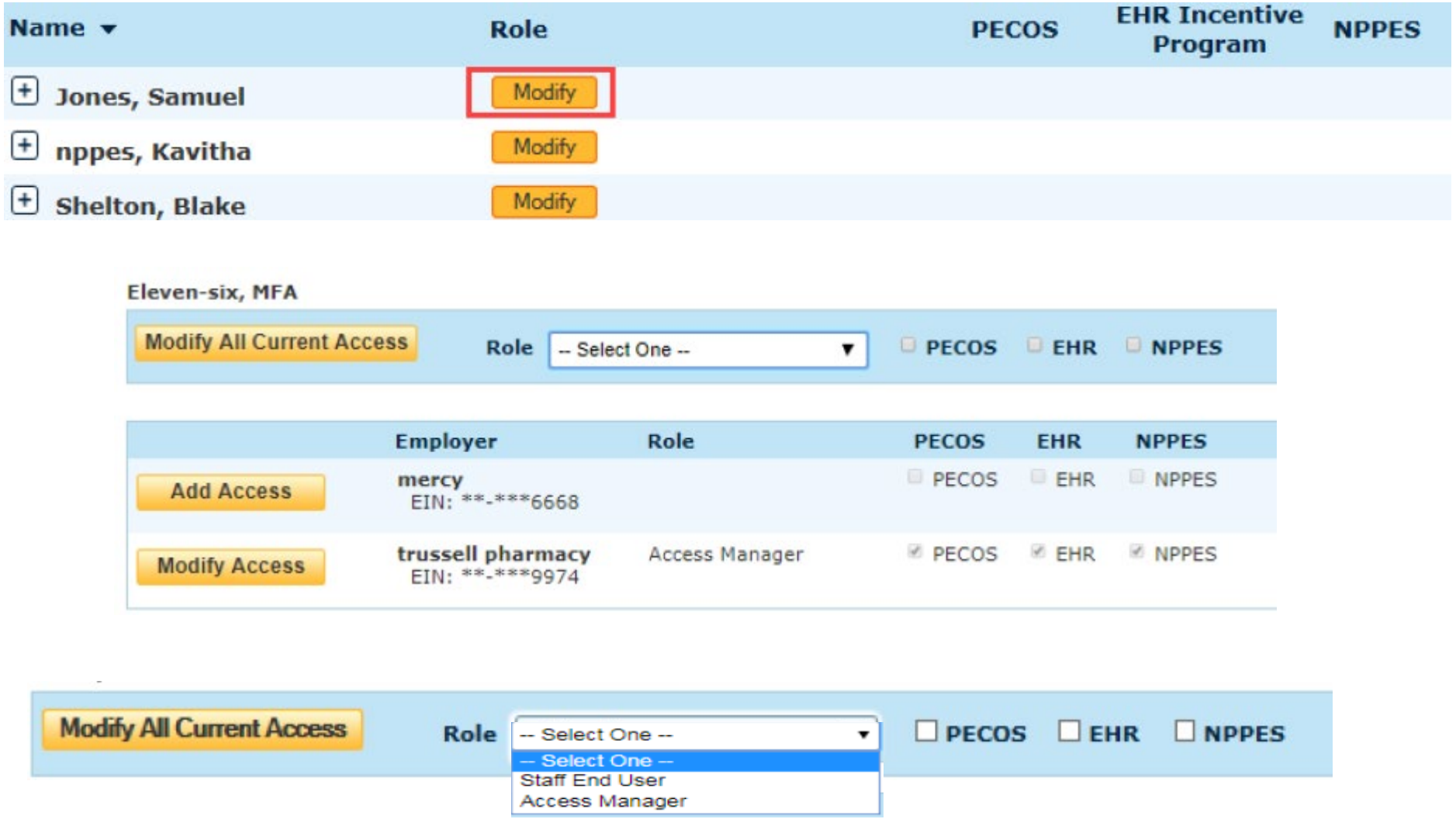
Enter Your PIN



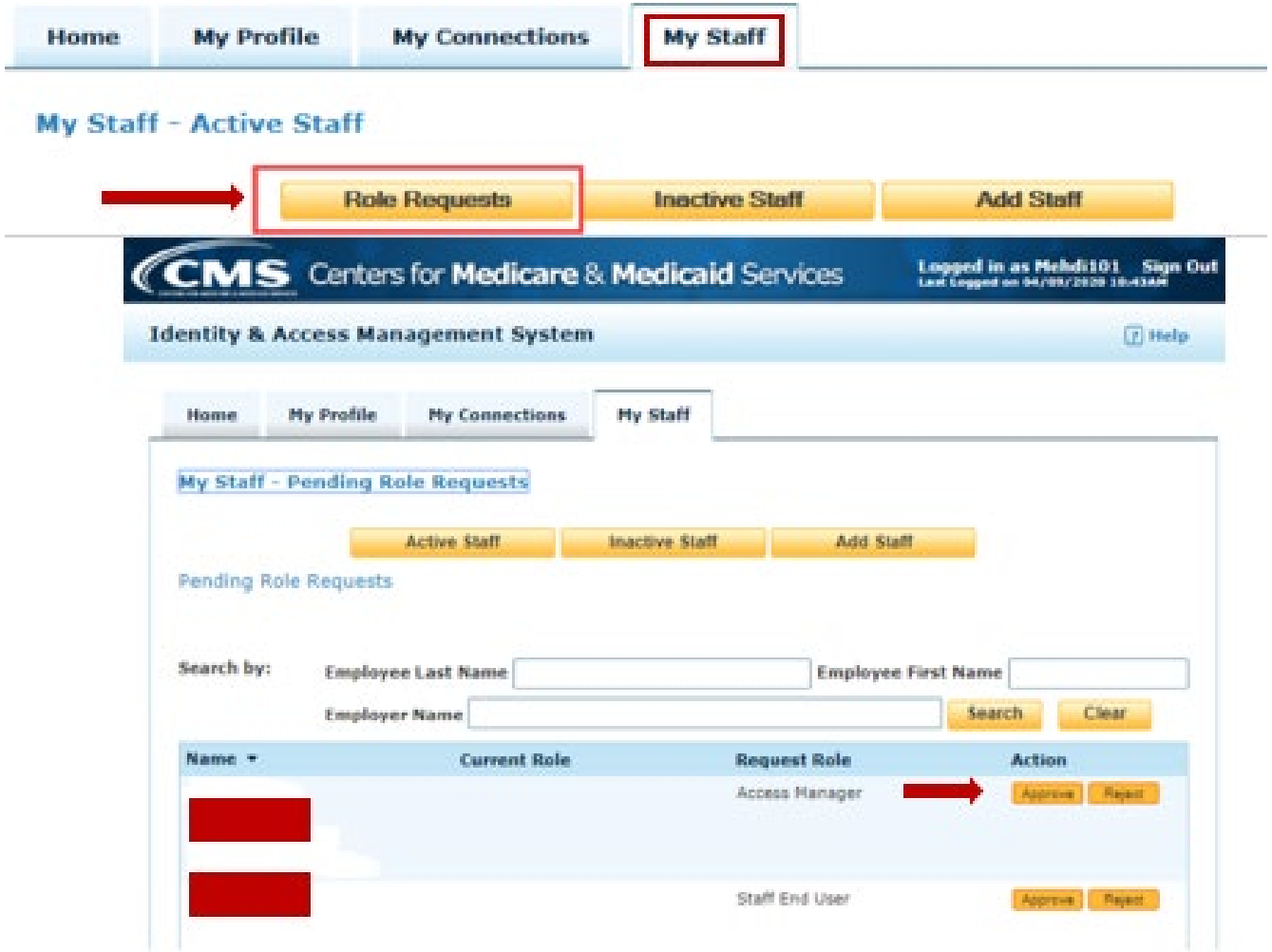
Enter Email and PIN



Modify Role


Name
Role
PECOS
EHR Incentive Program
NPPES
Jones, Samuel
Modify
nppes, Kavitha
Modify
Shelton, Blake
Modify
Eleven-six, MFA
Modify All Current Access
Role
-- Select One --
PECOS
EHR
NPPES
Employer
Role
PECOS
EHR
NPPES
Add Access
mercy
EIN: **-***6668
PECOS
EHR
NPPES
Modify Access
trussell pharmacy
EIN: **-***9974
Access Manager
PECOS
EHR
NPPES
Modify All Current Access
Role
-- Select One --
-- Select One --
Staff End User
Access Manager
PECOS
EHR
NPPES

AO Role Request Approval

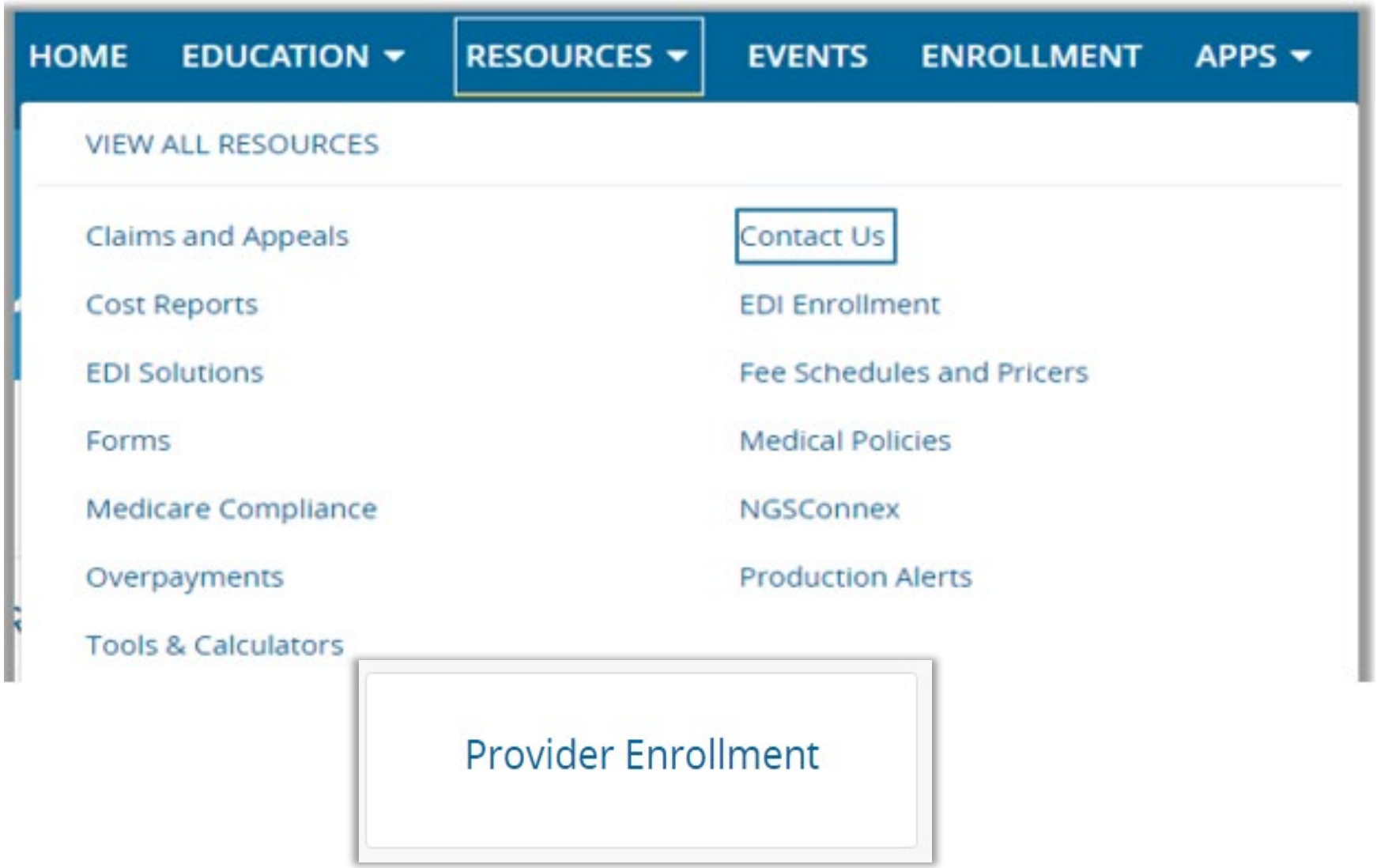


Contact Information and Resources

Contact Information

For Assistance With	Contact	Contact Information
• Changing an NPPES password • Establishing a new user ID and password for NPPES • Questions related to the NPI application	NPI Enumerator	Phone: 800-465-3203 TTY: 800-692-2326 Email: customerservice@npienumerator.com
• Errors encountered while accessing or entering information in PECOS • Forgotten PECOS user ids and passwords	EUS Help Desk	Phone: 866-484-8049 TTY: 866-523-4759 Email: EUSSupport@cgi.com Live Chat: https://eus.custhelp.com/

NGS Website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NGSConnex
Production Alerts
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

Questions?

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

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