Provider Enrollment: Getting Access to PECOS

7/7/2022

Today’s Presenters

- Laura Brown, CPC
  - Provider Outreach and Education
- Susan Stafford PMP, COA, AMR
  - Provider Outreach and Education

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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

Agenda

- Benefits of PECOS
- CMS Systems and Relationship
- Retrieve/Create I&A User Account
- Organization/Individual Enrollment Access
- Manage Staff’s Access
- Contact Information and Resources

Benefits of PECOS

Benefits of PECOS

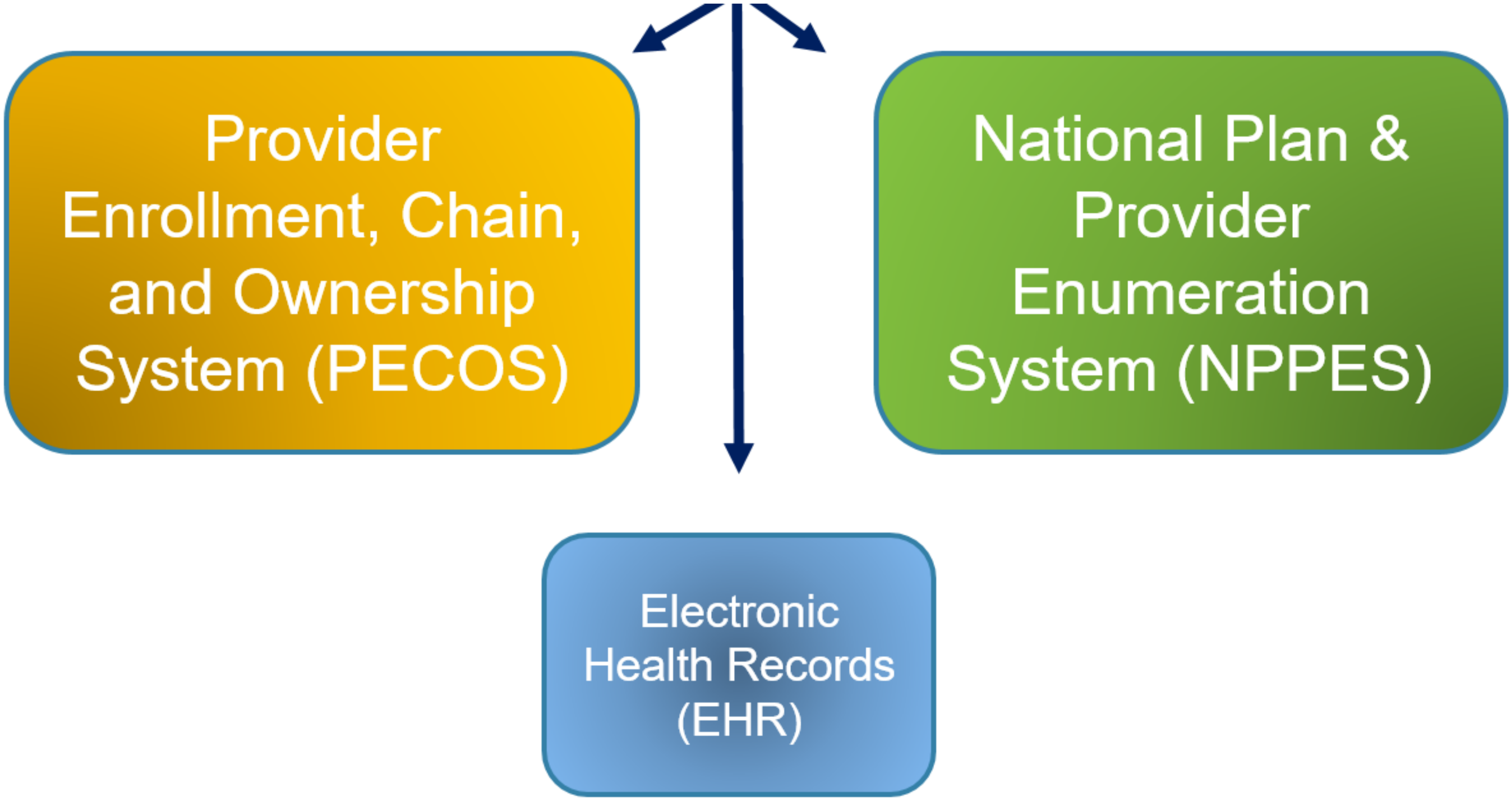
- Access to current Medicare provider enrollment information submitted electronically or by paper
- Submit electronic application for any provider enrollment scenario with the following features
    - electronic signatures or upload certification statements
    - upload supporting documents (PDF or TIFF)

Learn About PECOS

- References
  - NGS website: Learn About PECOS Web Part A or Part B
  - CMS website: Internet-based PECOS
  - PECOS website: Provider & Supplier Resources, Enrollment Tutorials and Accessibility

CMS Systems and Relationship

Identity & Access (I&A) Management System

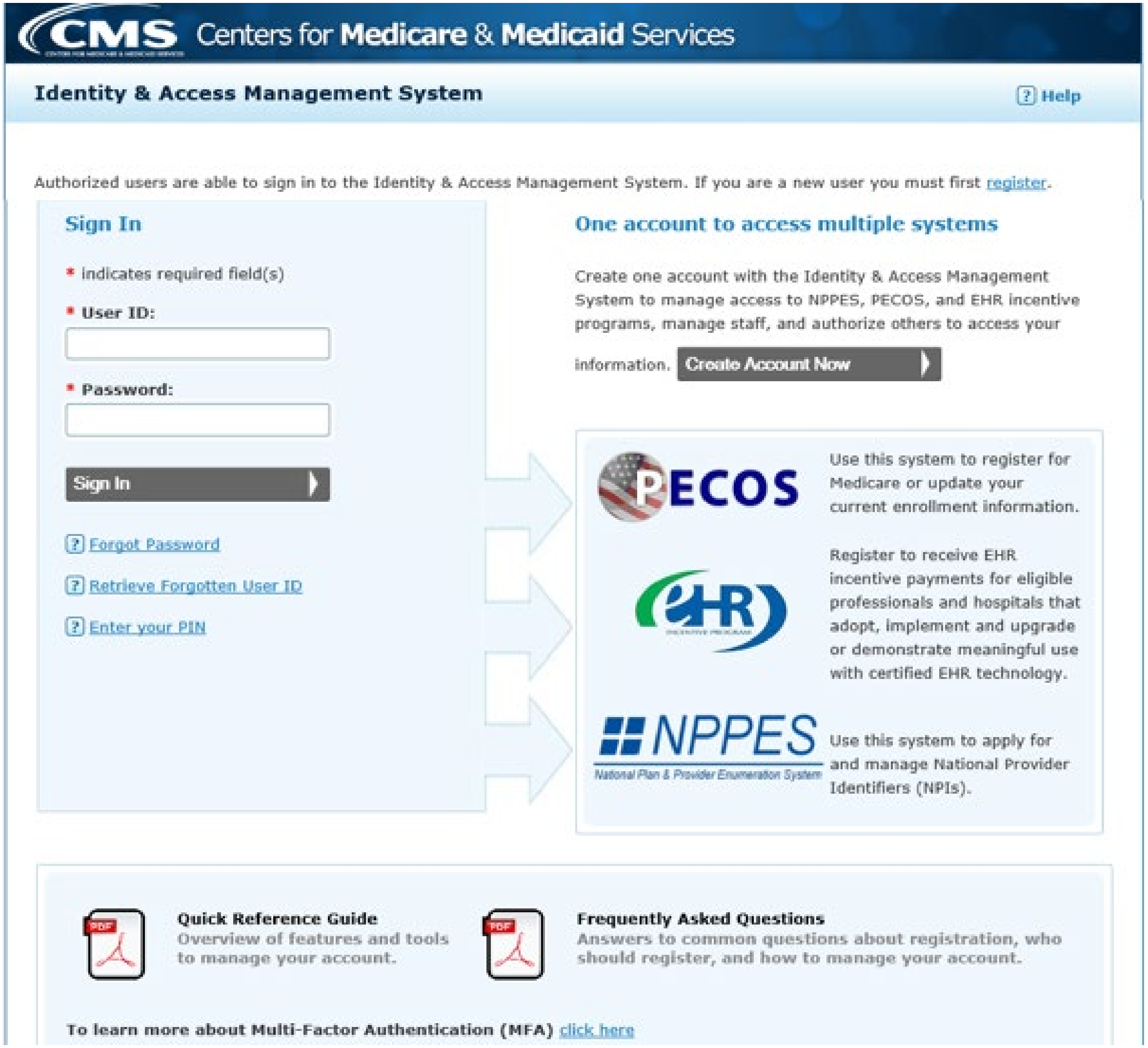


Provider Enrollment, Chain, and Ownership System (PECOS)

National Plan & Provider Enumeration System (NPPES)

Electronic Health Records (EHR)

Identity & Access Management System


CMS
Centers for Medicare & Medicaid Services
Help
Sign In
Create Account Now
PECOS
eHR
NPPES
National Plan & Provider Enumeration System
PDF
PDF

Identity & Access Management System

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:**

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, PECOS, and EHR incentive programs, manage staff, and authorize others to access your information.

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

Register to receive EHR incentive payments for eligible professionals and hospitals that adopt, implement and upgrade or demonstrate meaningful use with certified EHR technology.

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.

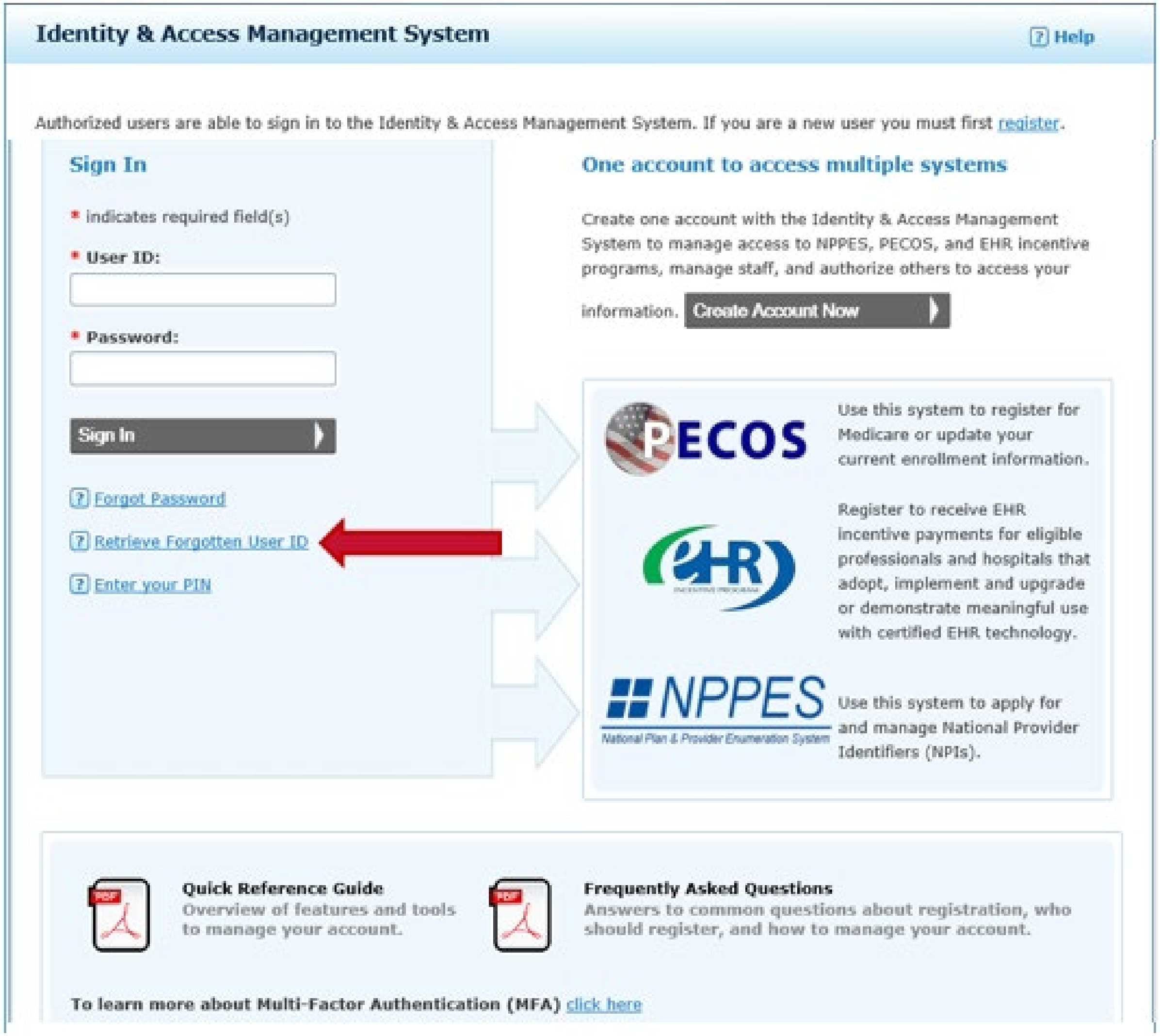
To learn more about Multi-Factor Authentication (MFA) click here

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 Established I&A User Account

Retrieve Forgotten User ID



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Create Account Now
PECOS
EHR
NPPES
National Plan & Provider Enumeration System

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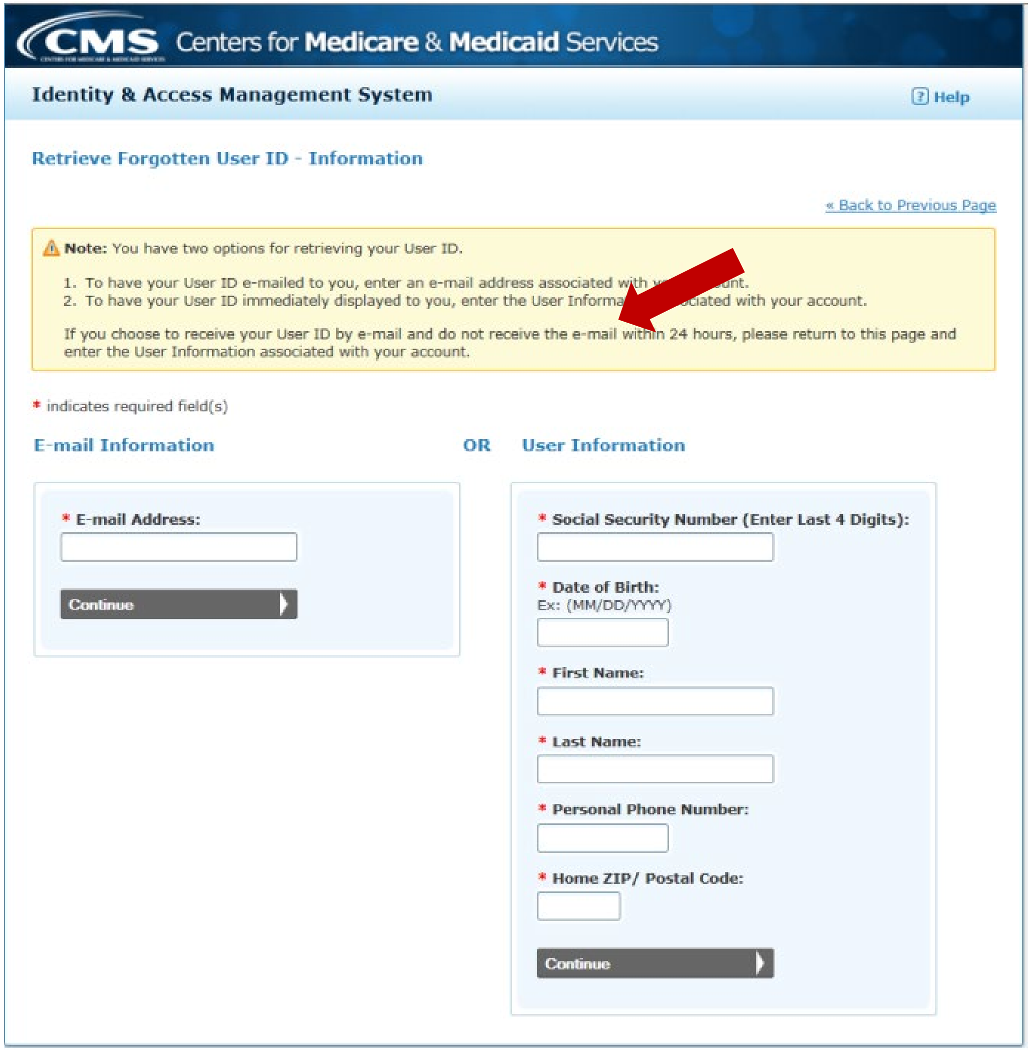
Retrieve Forgotten User ID - Information


CMS Centers for Medicare & Medicaid Services
Identity & Access Management System
? Help
« Back to Previous Page
Continue
Continue

Retrieve Forgotten User ID - Information

⚠ **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 y unt.
2. To have your User ID immediately displayed to you, enter the User Informa ociated 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:**

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

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

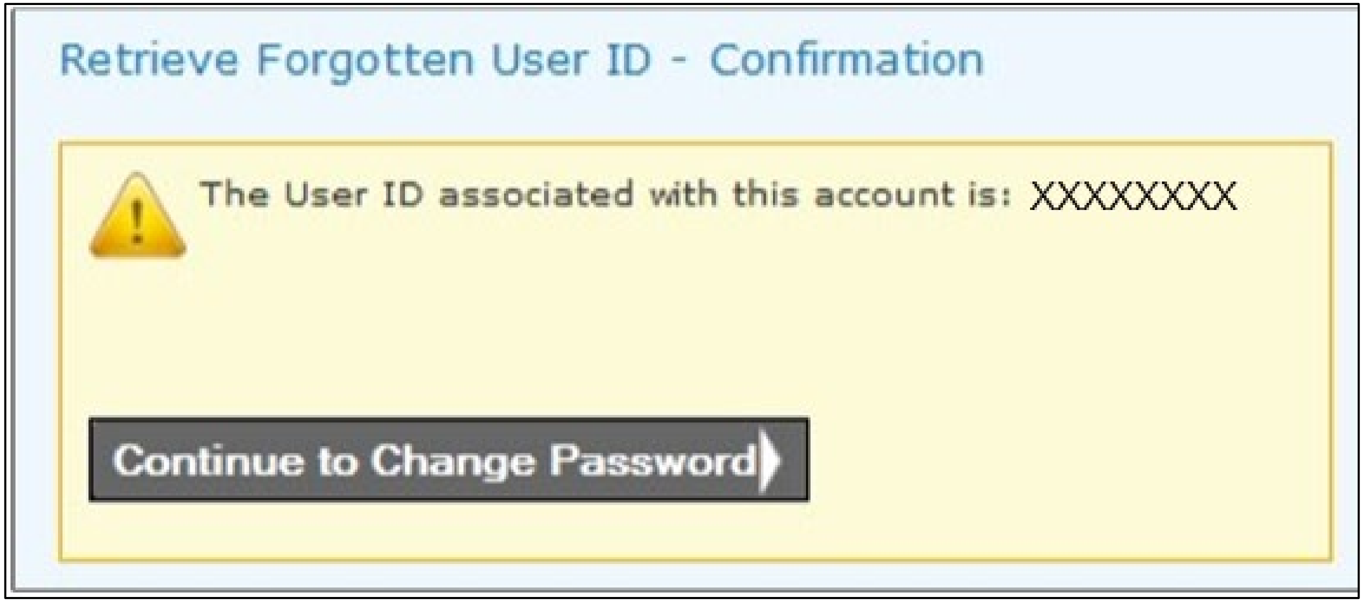
* **First Name:**

* **Last Name:**

* **Personal Phone Number:**

* **Home ZIP/ Postal Code:**

Retrieve Forgotten User ID - Confirmation

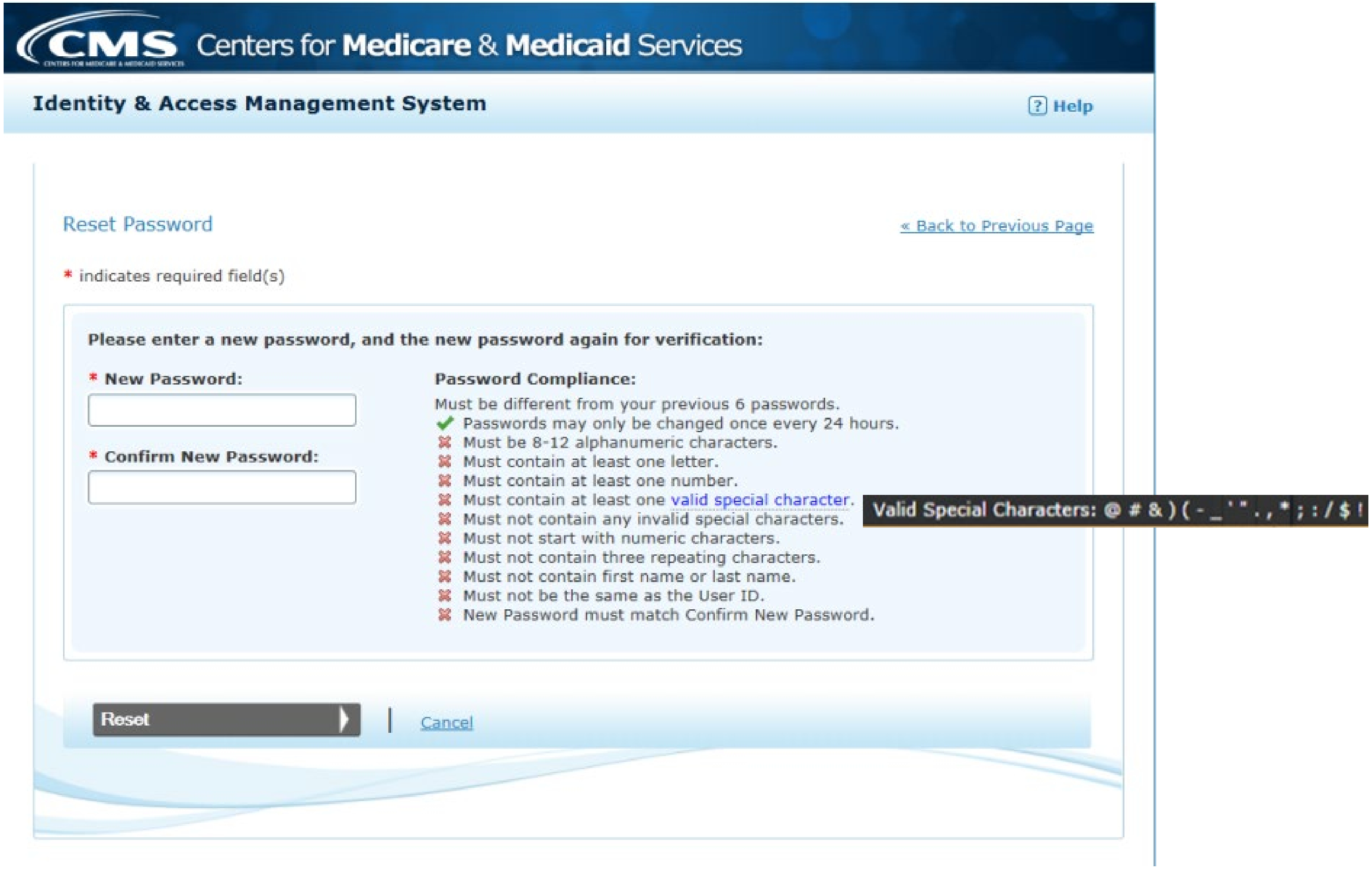


Retrieve Forgotten User ID - Confirmation

The User ID associated with this account is: XXXXXXXX

Continue to Change Password

Reset Password



Identity & Access Management System

Reset Password

* indicates required field(s)

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

*** New Password:**

*** Confirm New Password:**

Password Compliance:

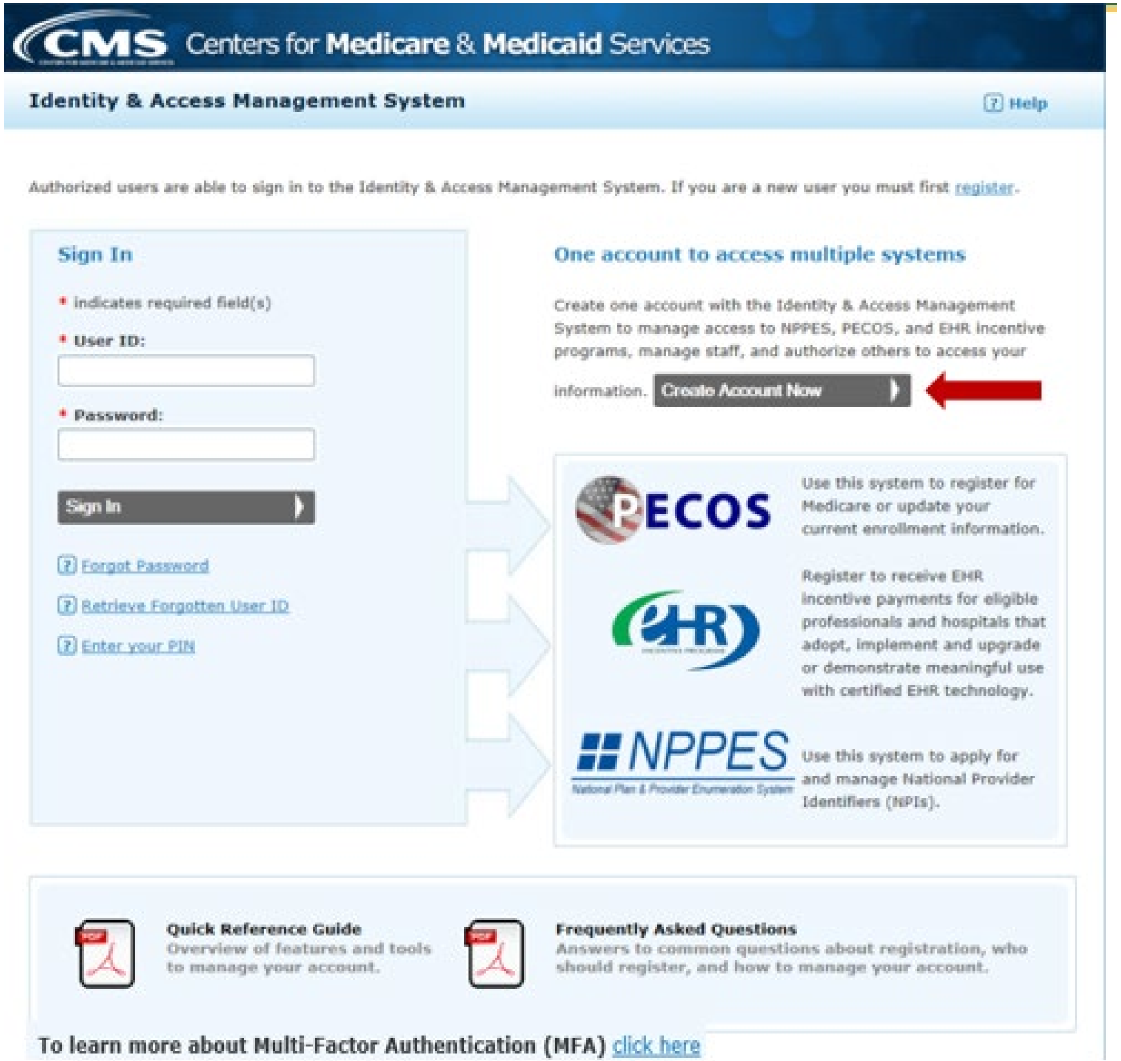
Must be different from your previous 6 passwords.

- ✓ 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: @ # &) (- _ ' " . , * ; : / $!

Create New I&A User Account

Create Account Now



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Identity & Access Management System

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NPPES
National Plan & Provider Enumeration System

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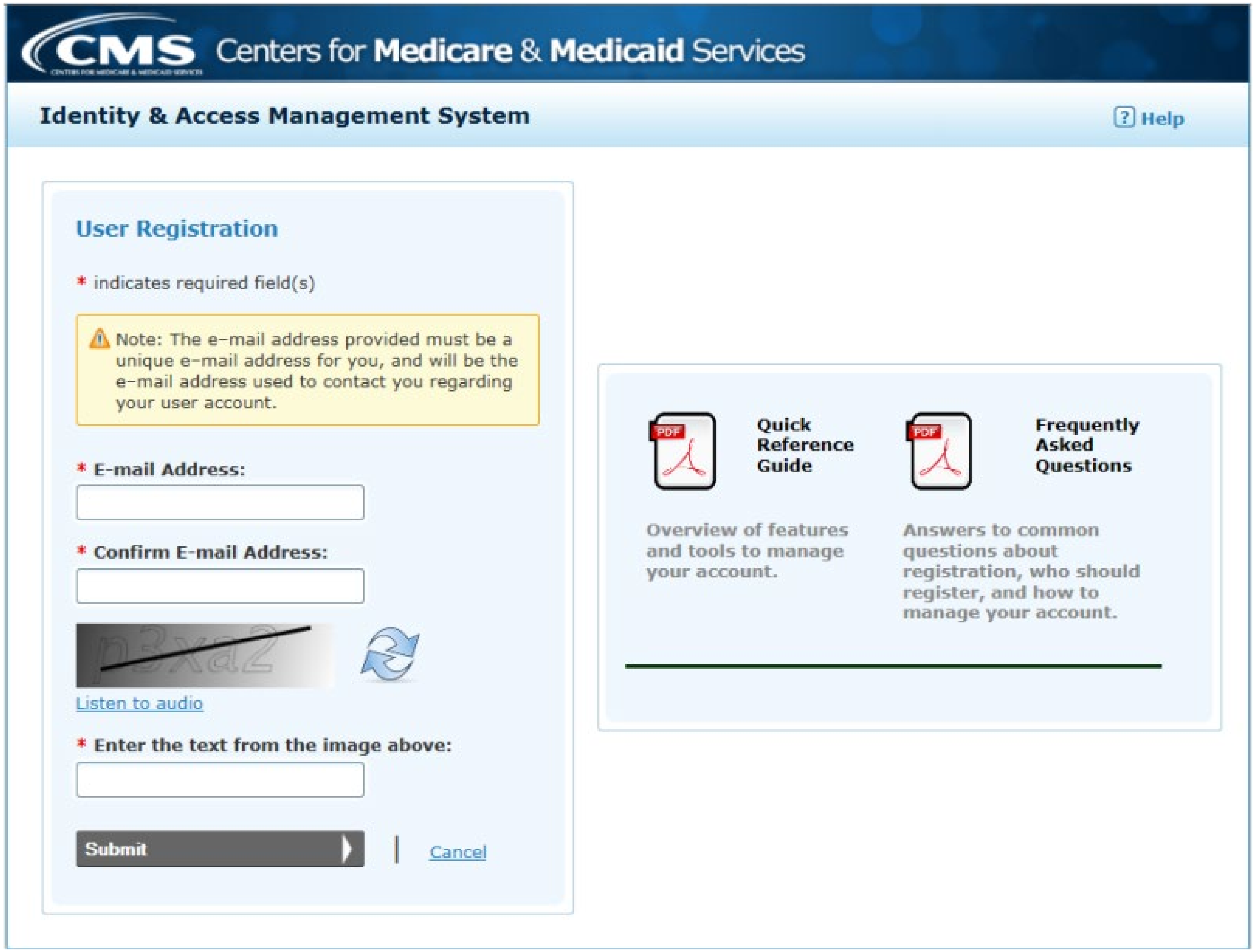
User Registration



CMS 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:

p3xa2
Listen to audio

* Enter the text from the image above:

Submit
Cancel

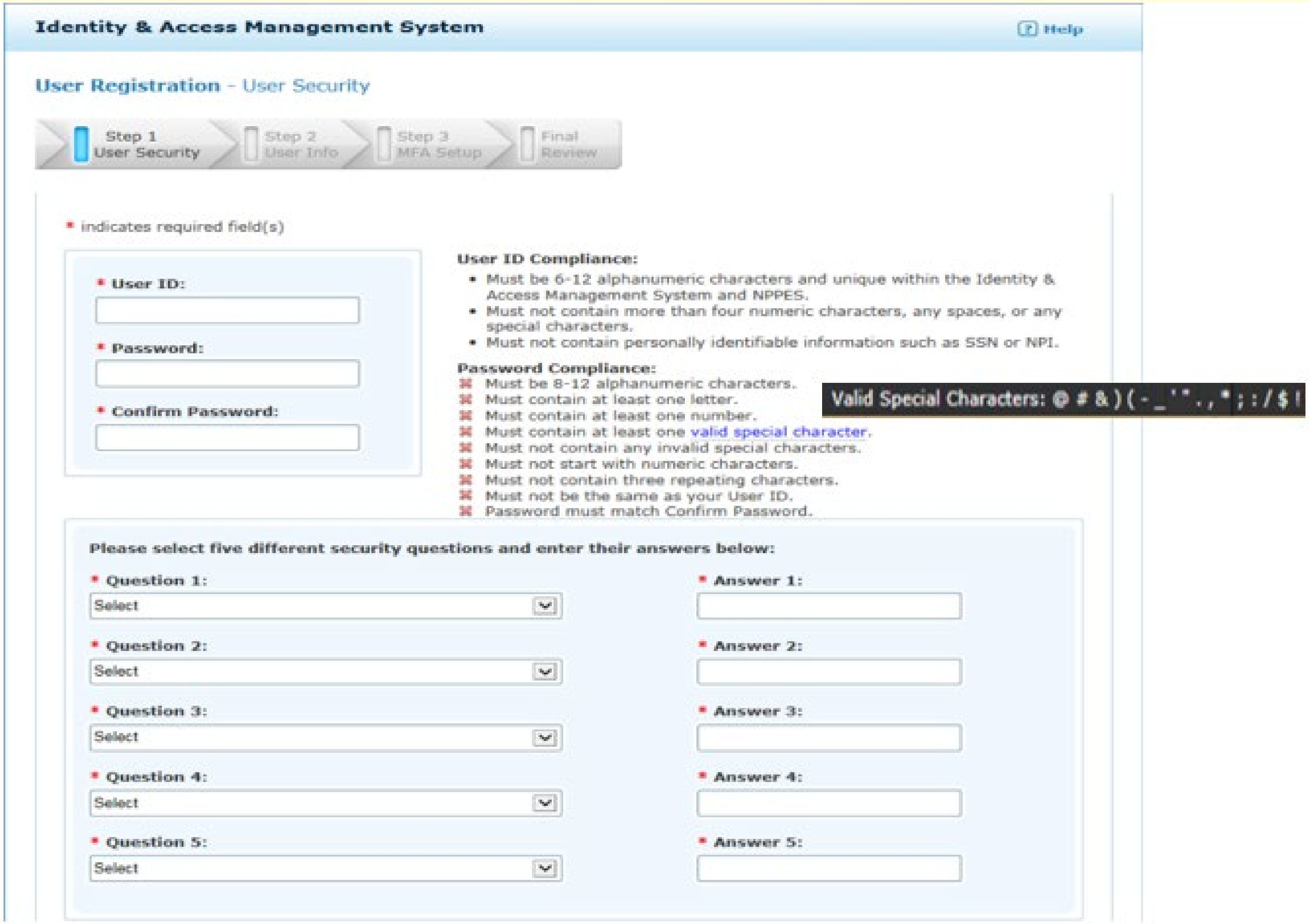
Quick Reference Guide

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

User Registration - User Security

* 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:

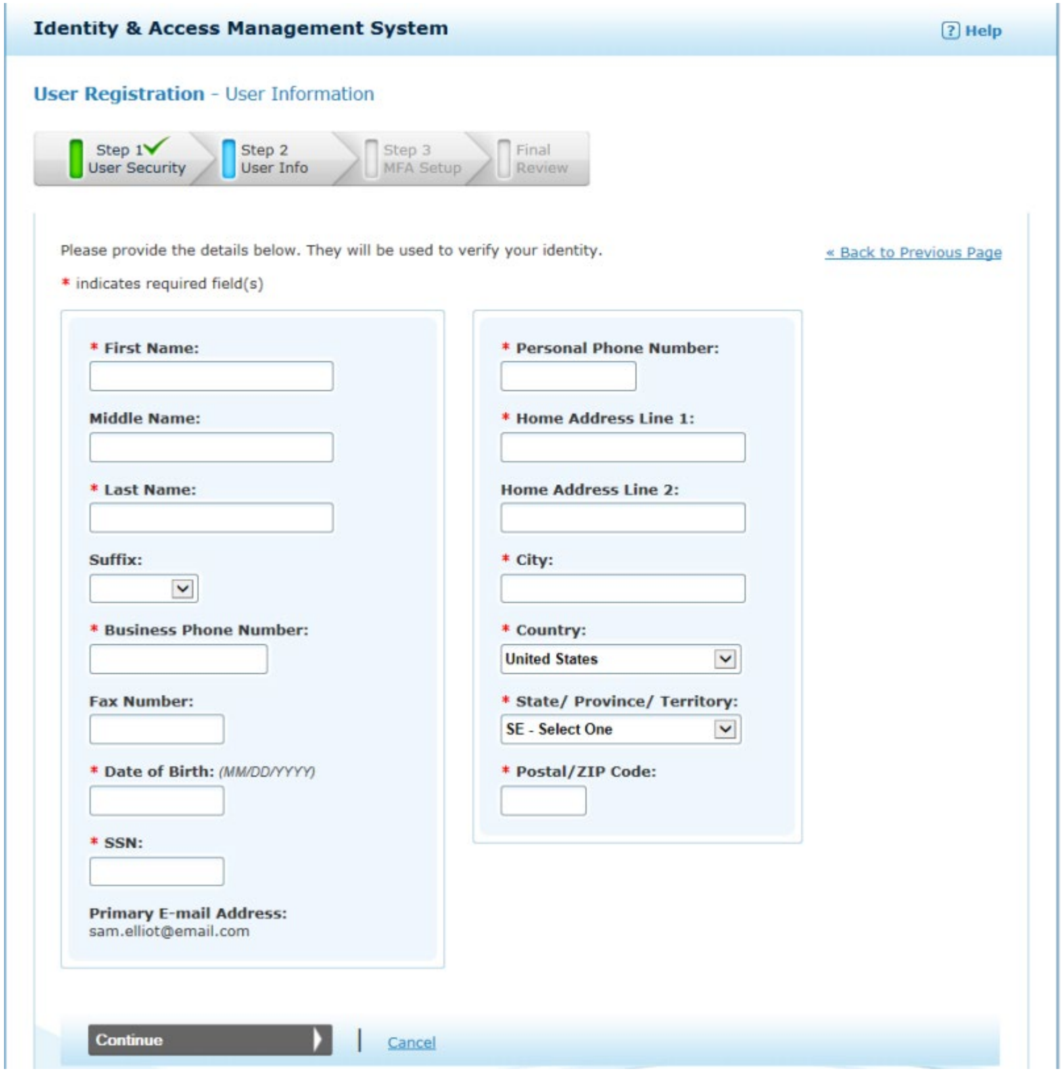
- ✗ Must be 8-12 alphanumeric characters.
- ✗ Must contain at least one letter.
- ✗ Must contain at least one number.
- ✗ Must contain at least one valid special character.
- ✗ Must not contain any invalid special characters.
- ✗ Must not start with numeric characters.
- ✗ Must not contain three repeating 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:

* **Question 1:** Select	* **Answer 1:**
* **Question 2:** Select	* **Answer 2:**
* **Question 3:** Select	* **Answer 3:**
* **Question 4:** Select	* **Answer 4:**
* **Question 5:** Select	* **Answer 5:**

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)

* **First Name:**

Middle Name:

* **Last Name:**

Suffix:

* **Business Phone Number:**

Fax Number:

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

* **SSN:**

Primary E-mail Address:
sam.elliot@email.com

* **Personal Phone Number:**

* **Home Address Line 1:**

Home Address Line 2:

* **City:**

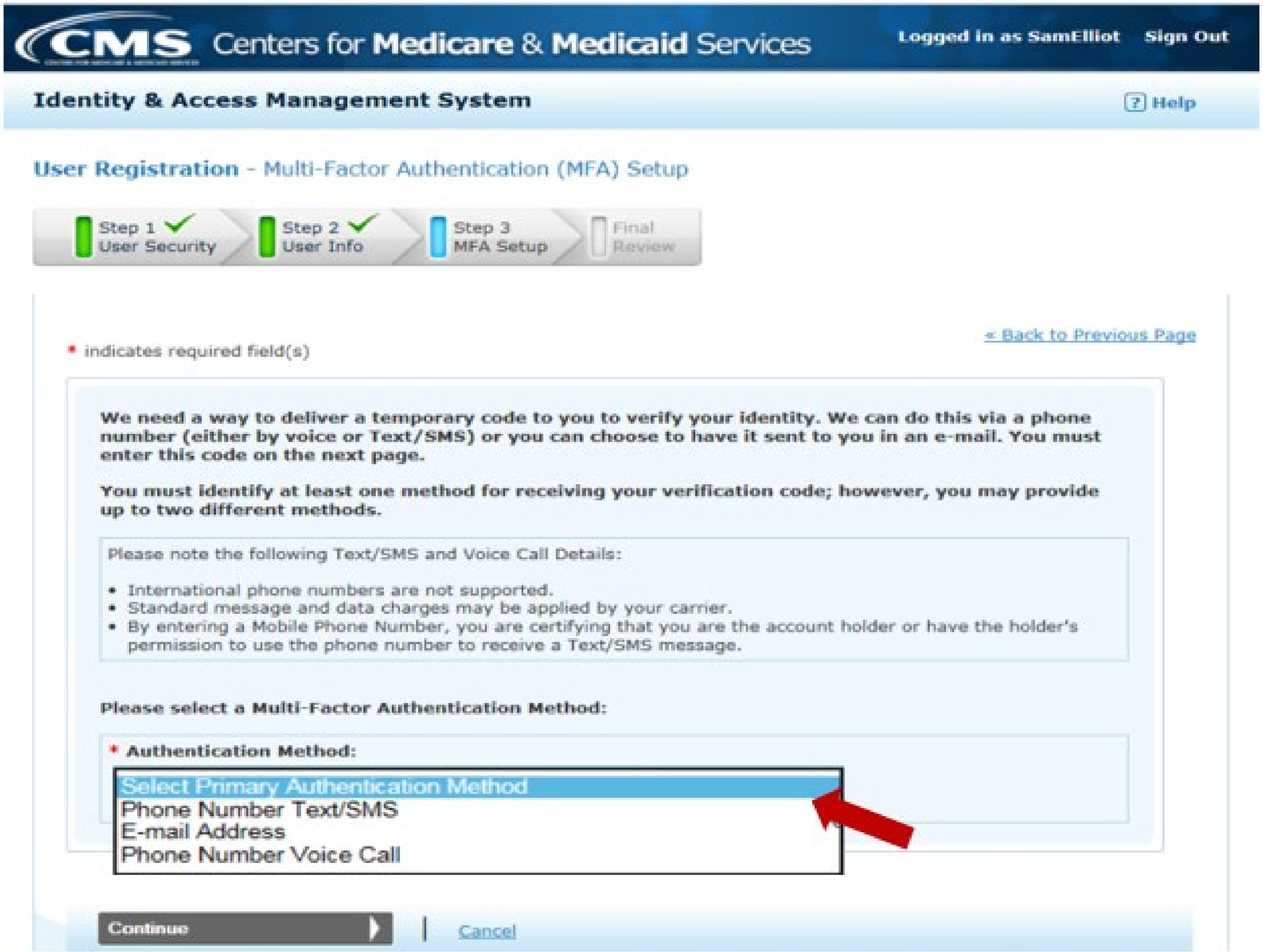
* **Country:** United States

* **State/ Province/ Territory:** SE - Select One

* **Postal/ZIP Code:**

Continue
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.

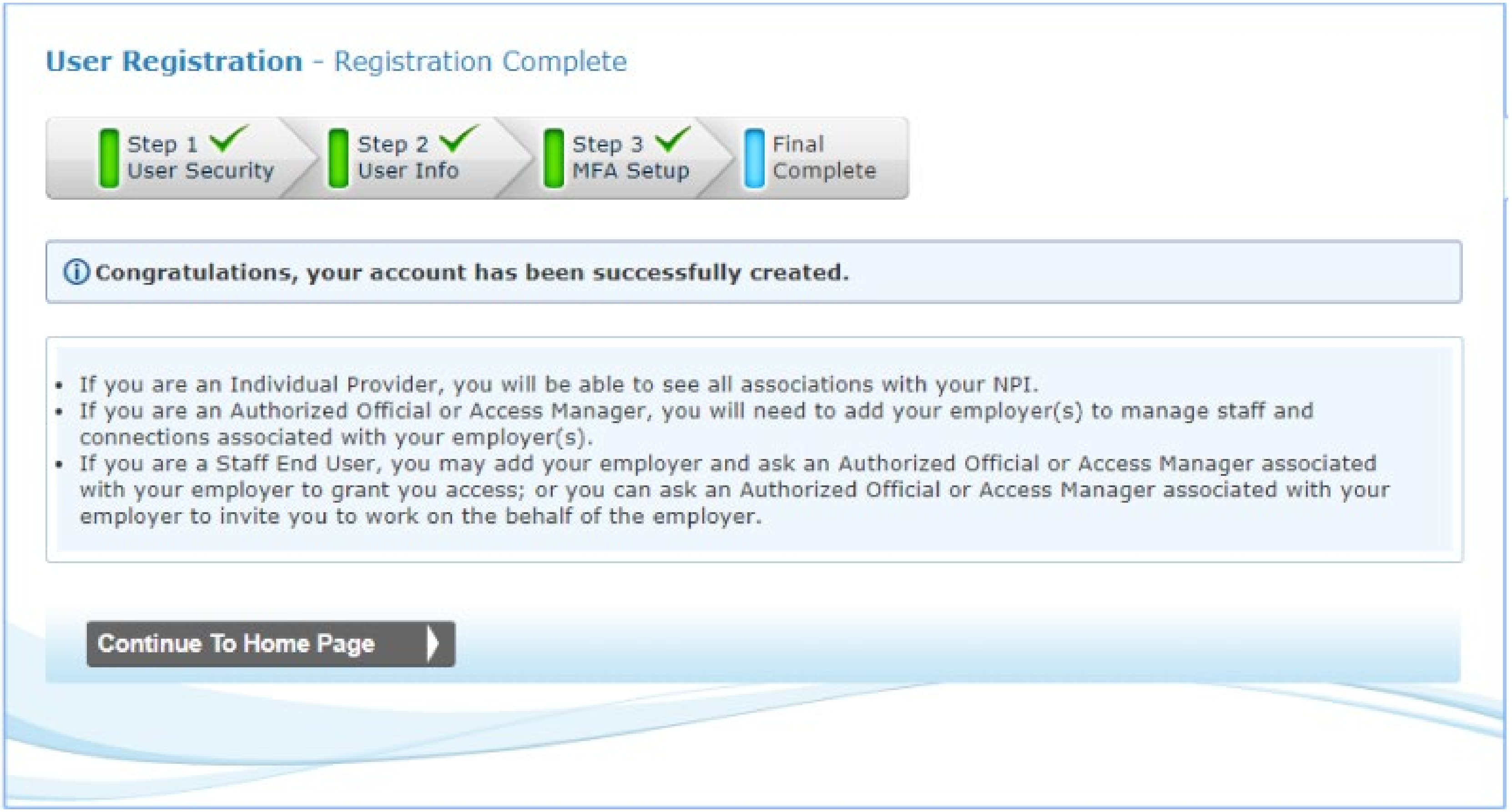
Please select a Multi-Factor Authentication Method:

* **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.

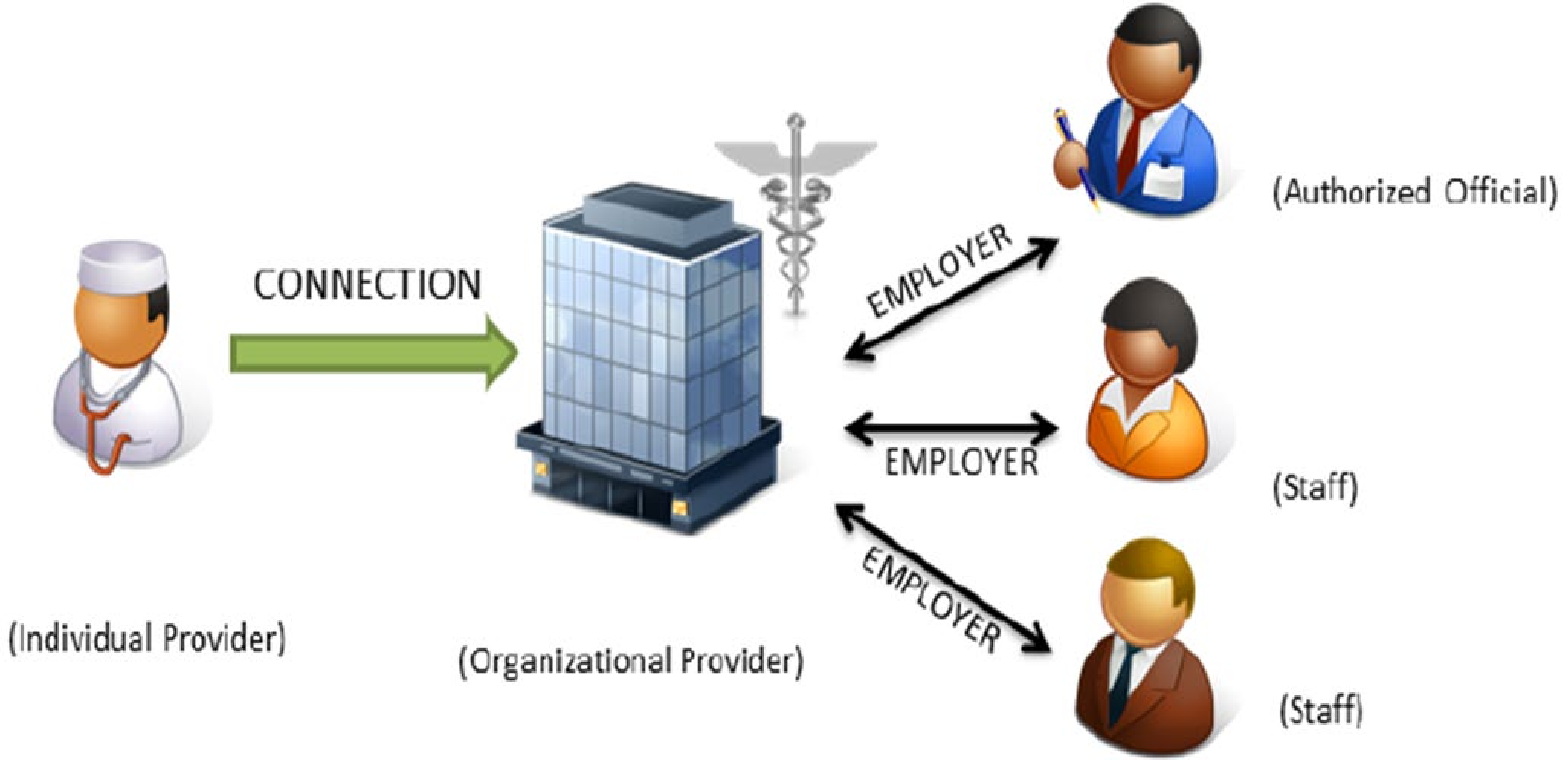
Continue To Home Page

My Profile Tab
Add An Employer

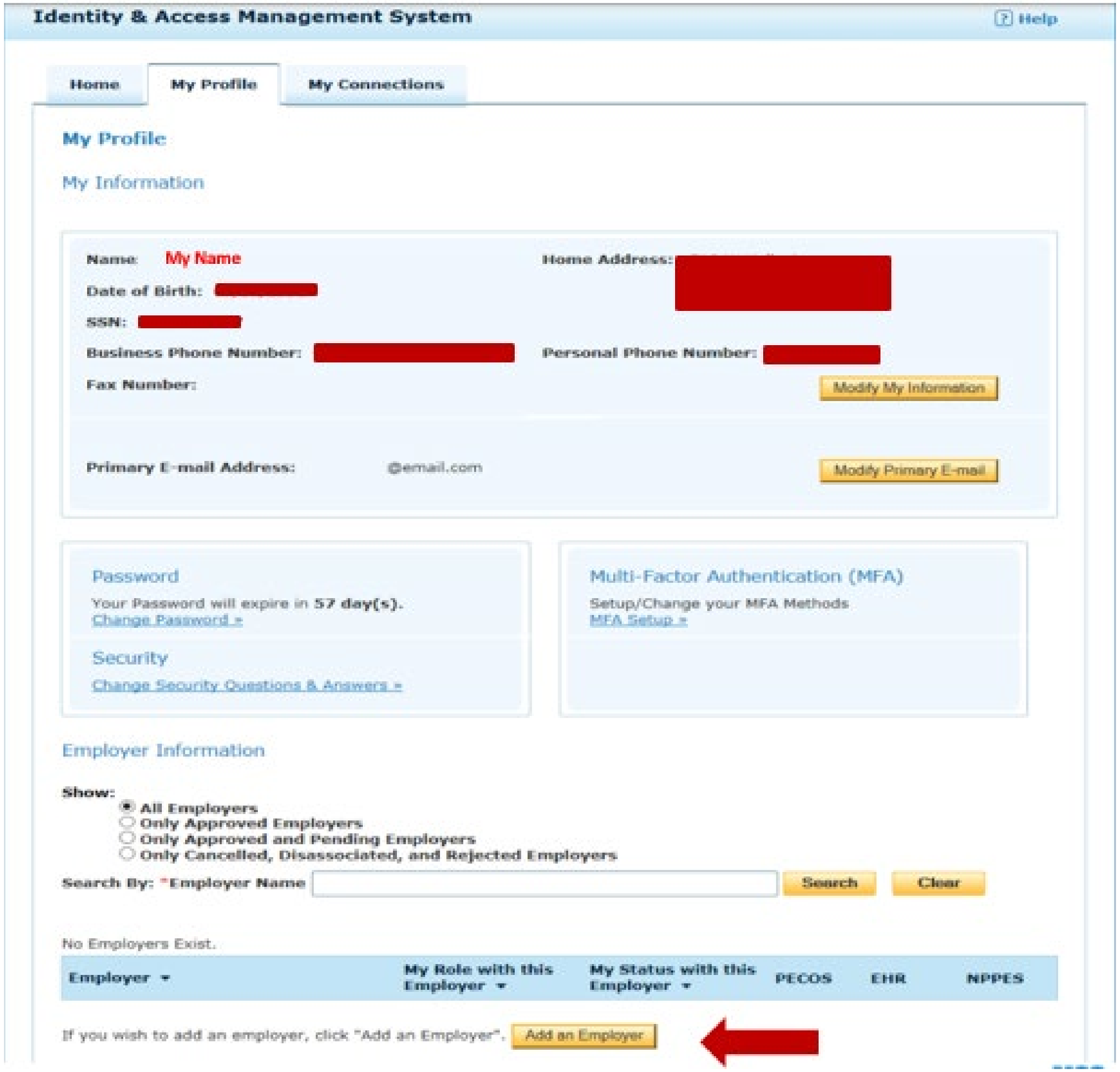
Roles

Role	Represent an Organization	Manage Staff	Approve/ Manage Connections	Act on Behalf of Individual or Organizational Providers
Individual Provider	Yes	Yes	Yes	Yes
Authorized Official	Yes	Yes	Yes	Yes
Access Manager	Yes	Yes	Yes	Yes
Staff	No	No	No	Yes
Surrogate	No	No	No	Yes

Roles and Relationships


CONNECTION
EMPLOYER
EMPLOYER
EMPLOYER
(Authorized Official)
(Staff)
(Staff)
(Individual Provider)
(Organizational Provider)

Add Employer


Identity & Access Management System
Help
Home
My Profile
My Connections
Modify My Information
Modify Primary E-mail
Search
Clear
Add an Employer

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:

Primary E-mail Address: @email.com

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

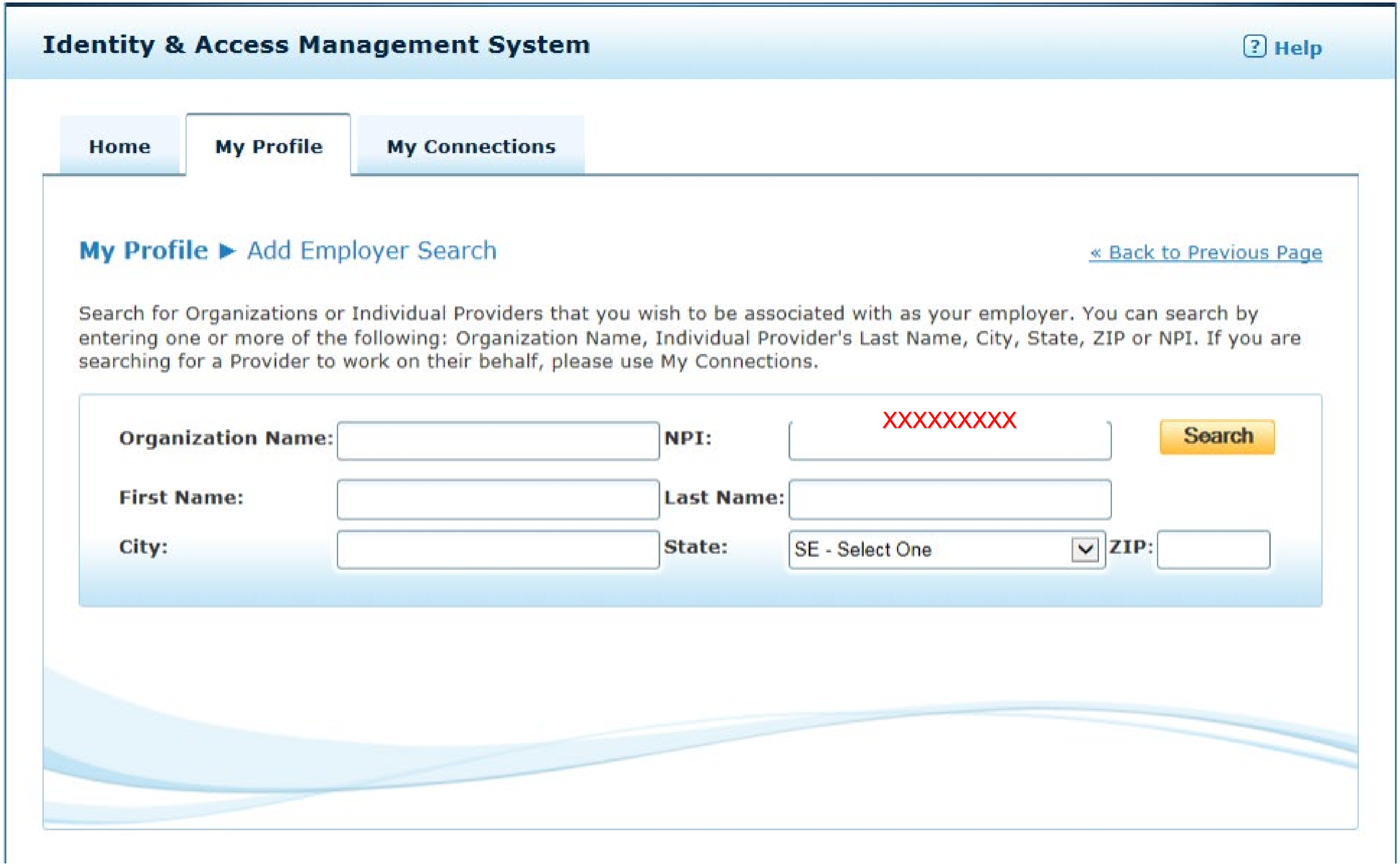
Search By: *Employer Name

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".

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:

NPI: XXXXXXXXX

First Name:

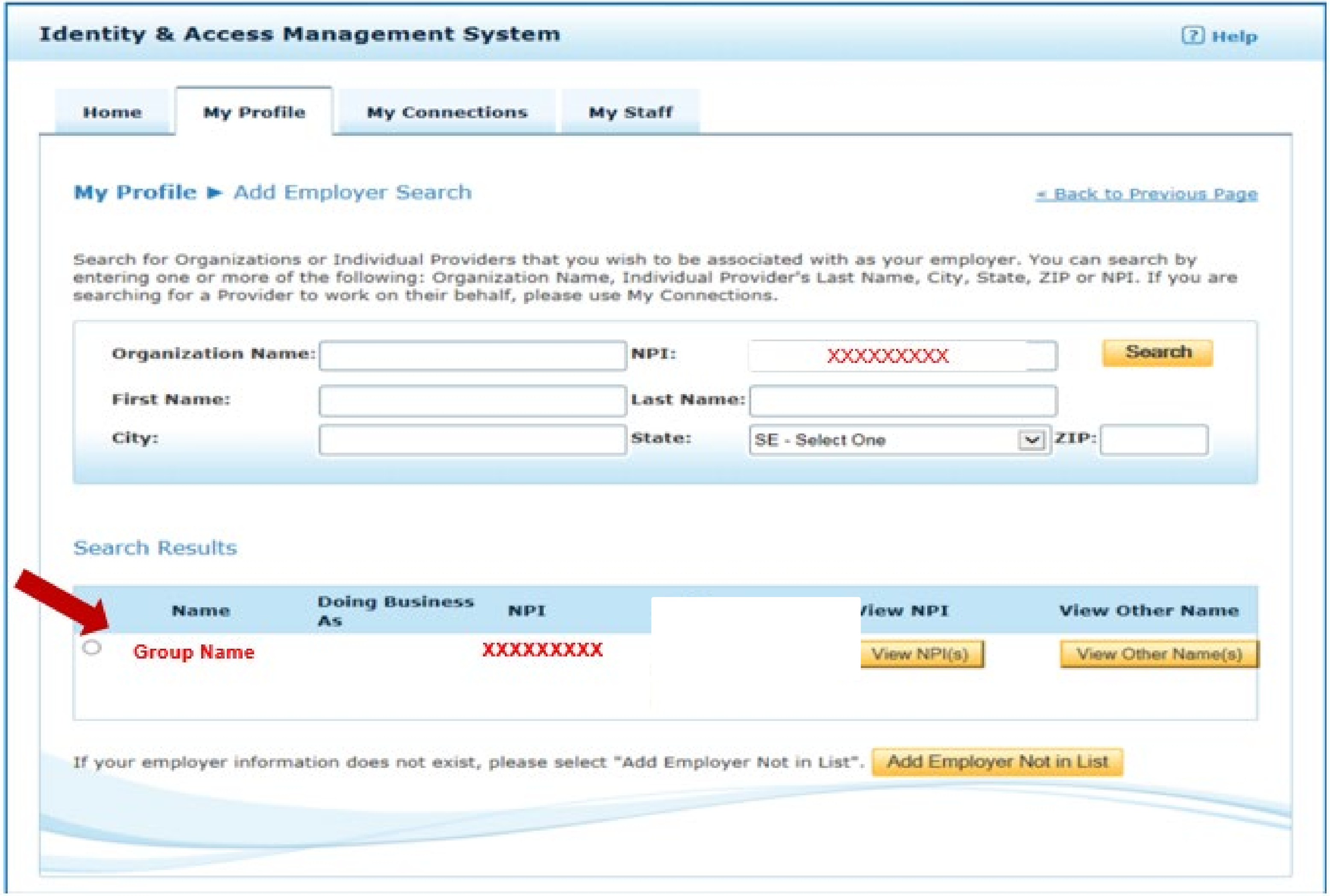
Last Name:

City:

State: SE - Select One

ZIP:

Search Results



Identity & Access Management System

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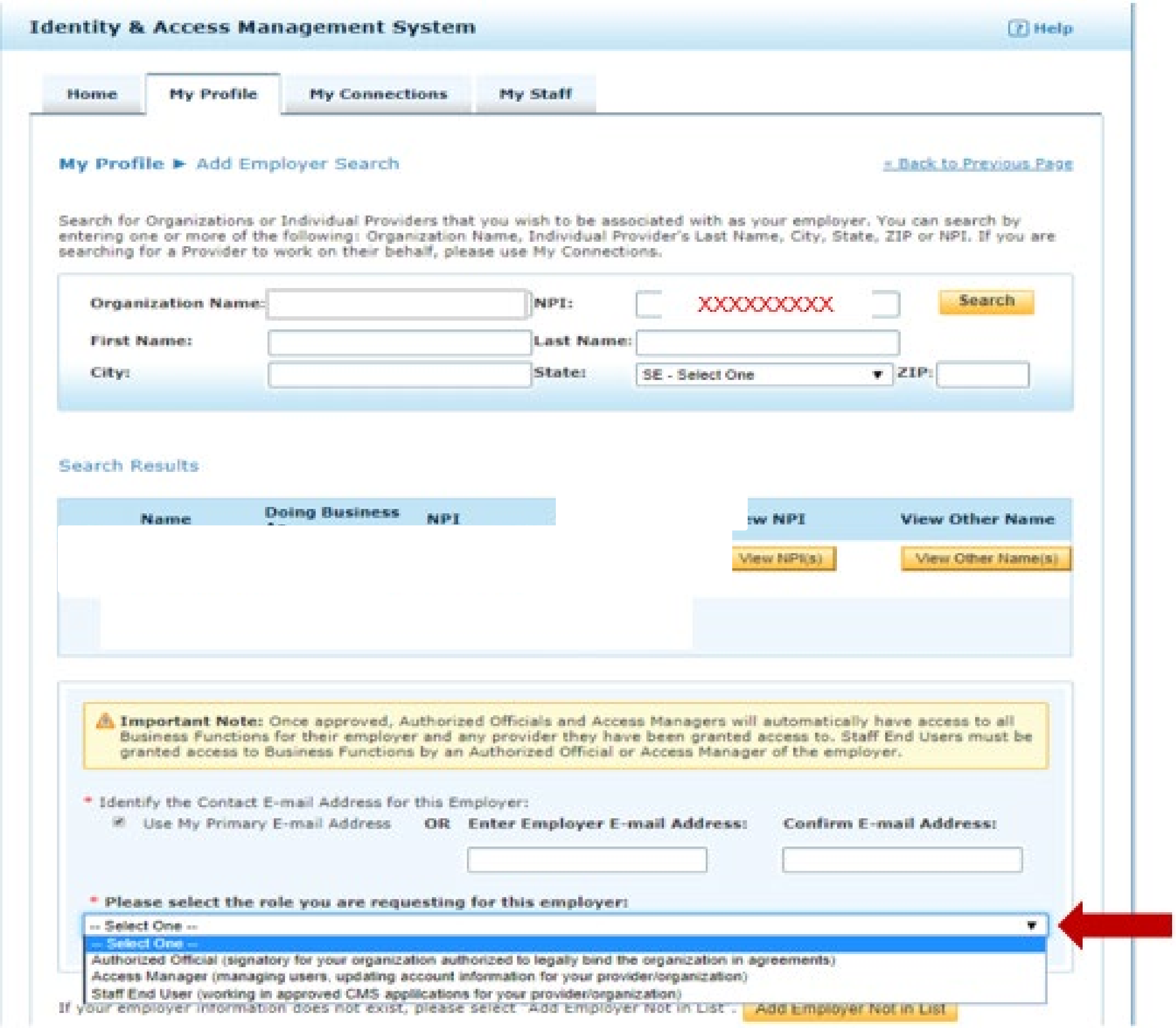
Organization Name:		**NPI:**	XXXXXXXXX
First Name:		**Last Name:**	
City:		**State:**	SE - Select One
ZIP:			

Search Results

	Name	Doing Business As	NPI		View NPI	View Other Name
○	Group Name		XXXXXXXXX		View NPI(s)	View Other Name(s)

If your employer information does not exist, please select "Add Employer Not in List". 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
Search
Search Results
View NPI(s)
View Other Name(s)
Add Employer Not in List

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

Name	Doing Business As	NPI	w NPI	View Other Name
			View NPI(s)	View Other Name(s)

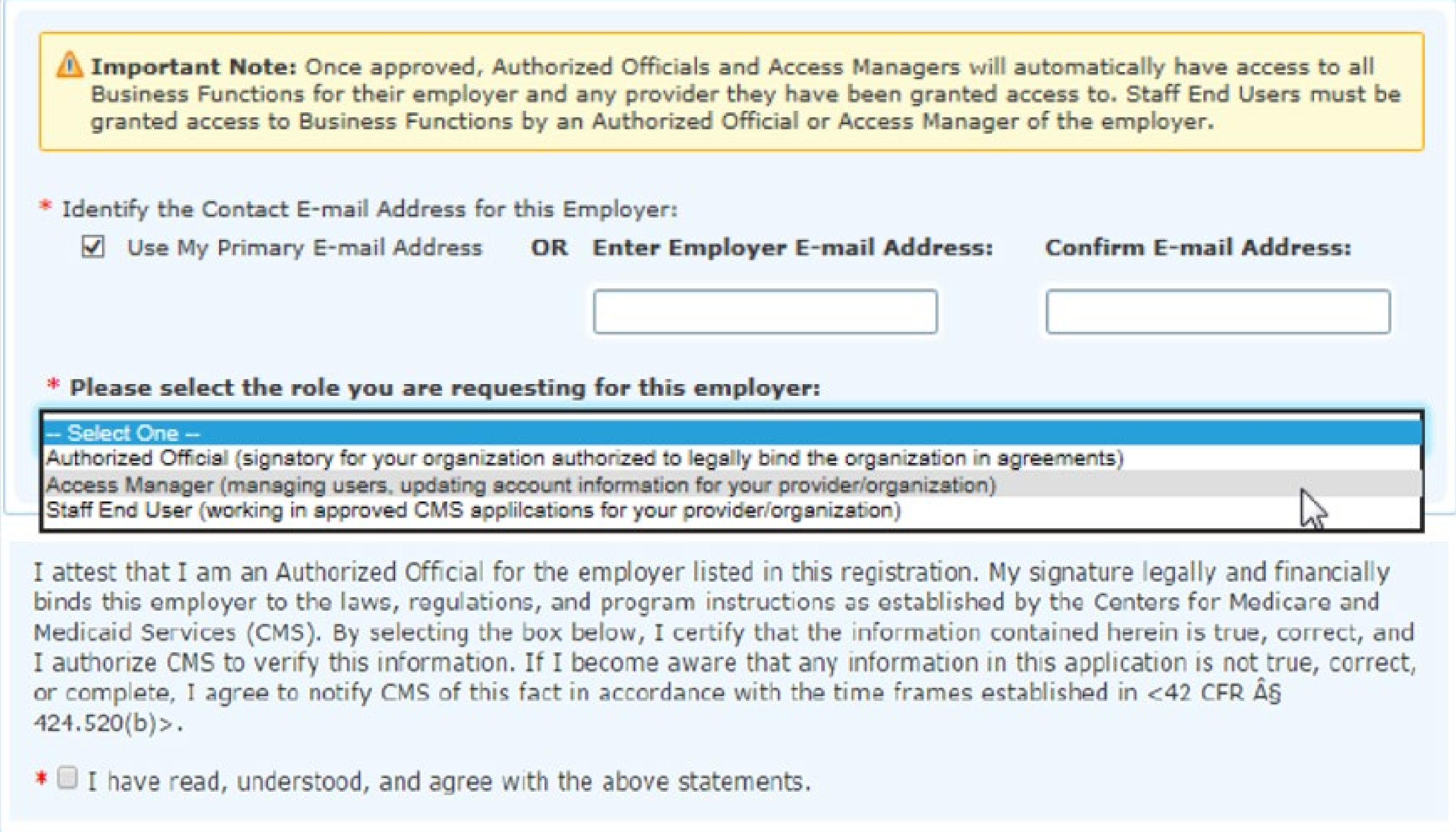
Important Note: Once approved, Authorized Officials and Access Managers will automatically have access to all Business Functions for their employer and any provider they have been granted access to. Staff End Users must be granted access to Business Functions by an Authorized Official or Access Manager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

Authorized Official or Access Manager



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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:**

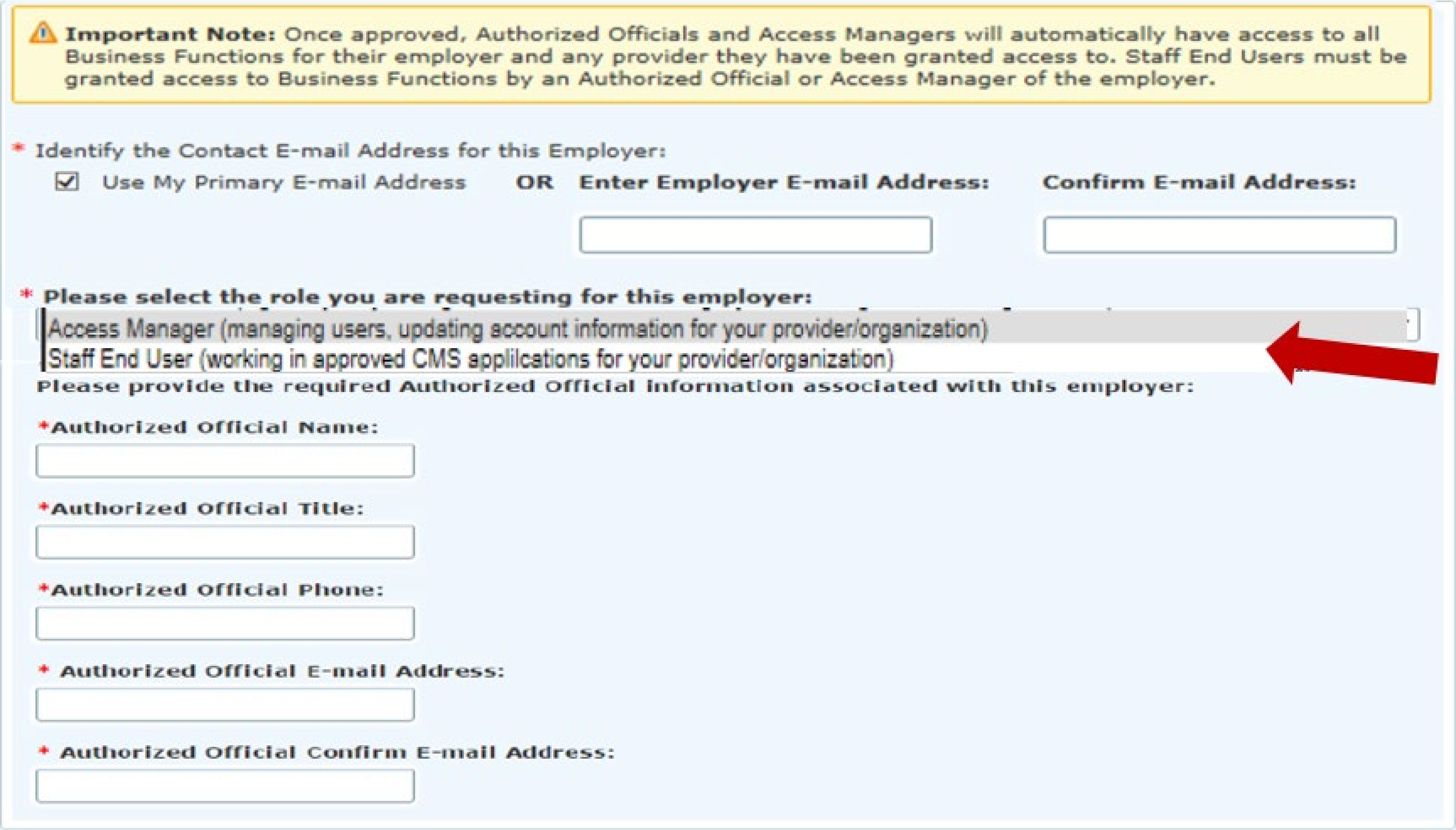
* **Please select the role you are requesting for this employer:**

-- 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 applilcations for your provider/organization)

I attest that I am an Authorized Official for the employer listed in this registration. My signature legally and financially binds this employer to the laws, regulations, and program instructions as established by the Centers for Medicare and Medicaid Services (CMS). By selecting the box below, I certify that the information contained herein is true, correct, and I authorize CMS to verify this information. If I become aware that any information in this application is not true, correct, or complete, I agree to notify CMS of this fact in accordance with the time frames established in <42 CFR Â§ 424.520(b)>.

* ☐ I have read, understood, and agree with the above statements.

Access Manager or Staff End User



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* **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 applilcations for your provider/organization)

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

***Authorized Official Name:**

***Authorized Official Title:**

***Authorized Official Phone:**

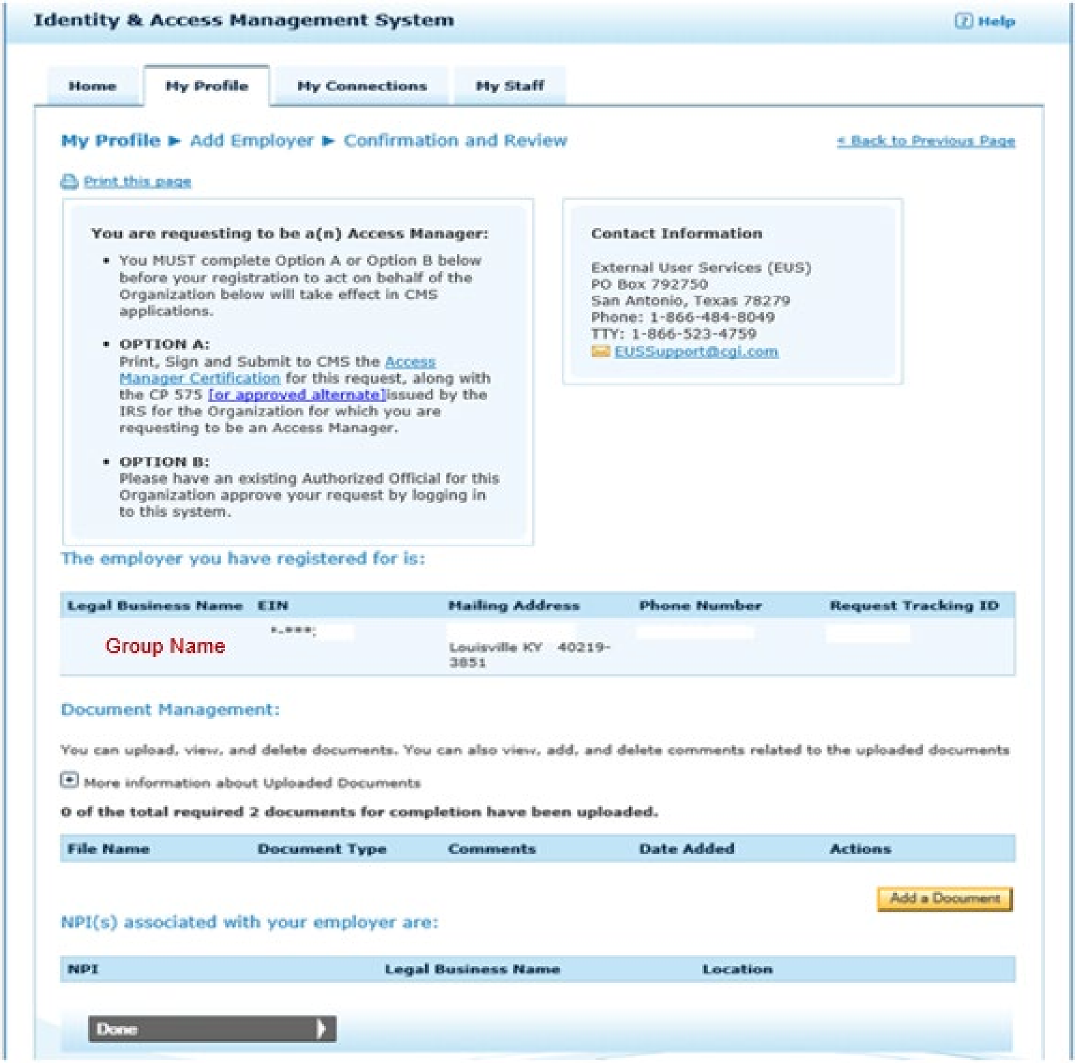
* **Authorized Official E-mail Address:**

* **Authorized Official Confirm E-mail Address:**

national government SERVICES

NGS MU

Confirmation and Review



My Profile ► Add Employer ► Confirmation and Review

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

The employer you have registered for is:

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

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

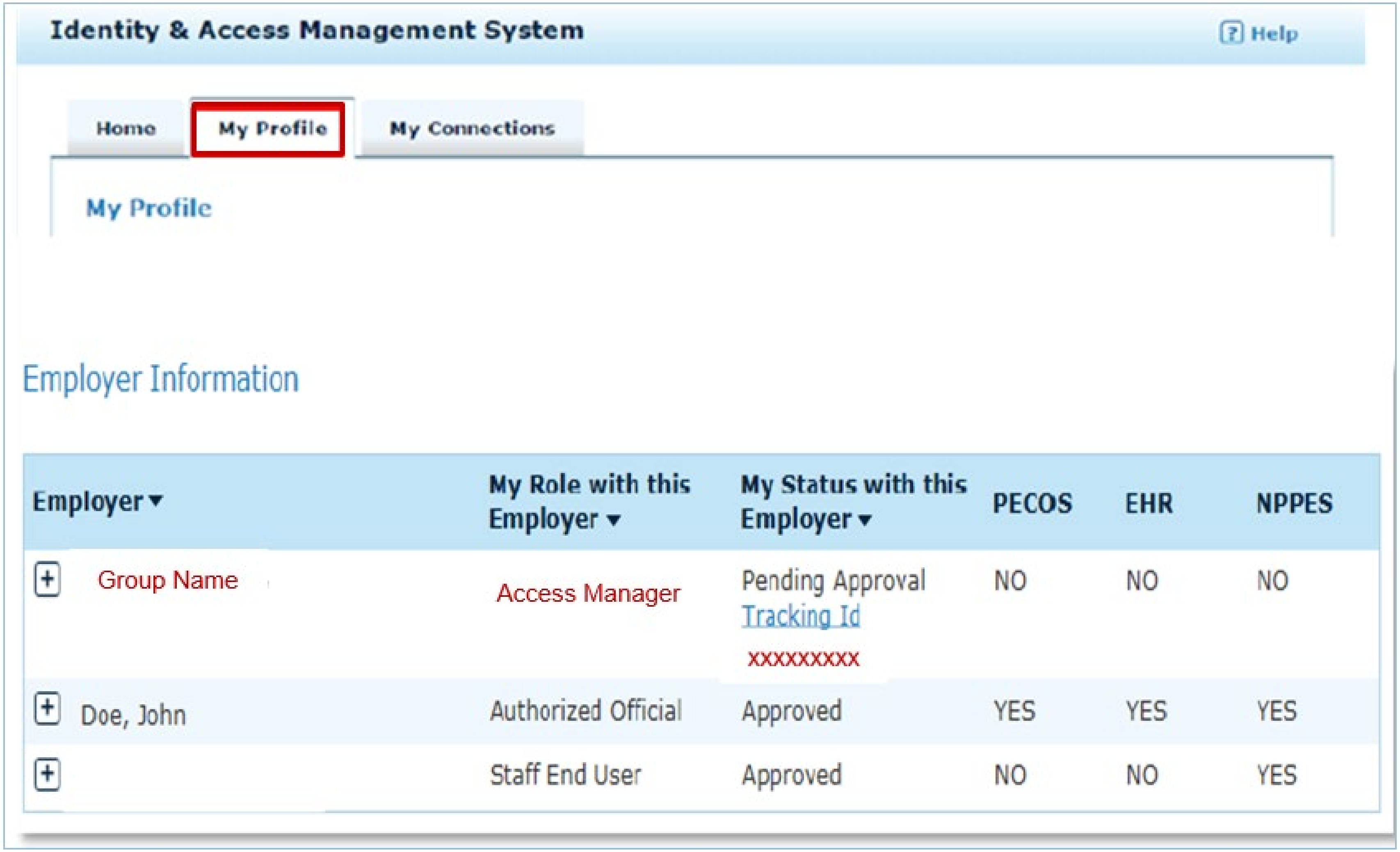
0 of the total required 2 documents for completion have been uploaded.

File Name	Document Type	Comments	Date Added	Actions

NPI(s) associated with your employer are:

NPI	Legal Business Name	Location

Employer Information



Identity & Access Management System

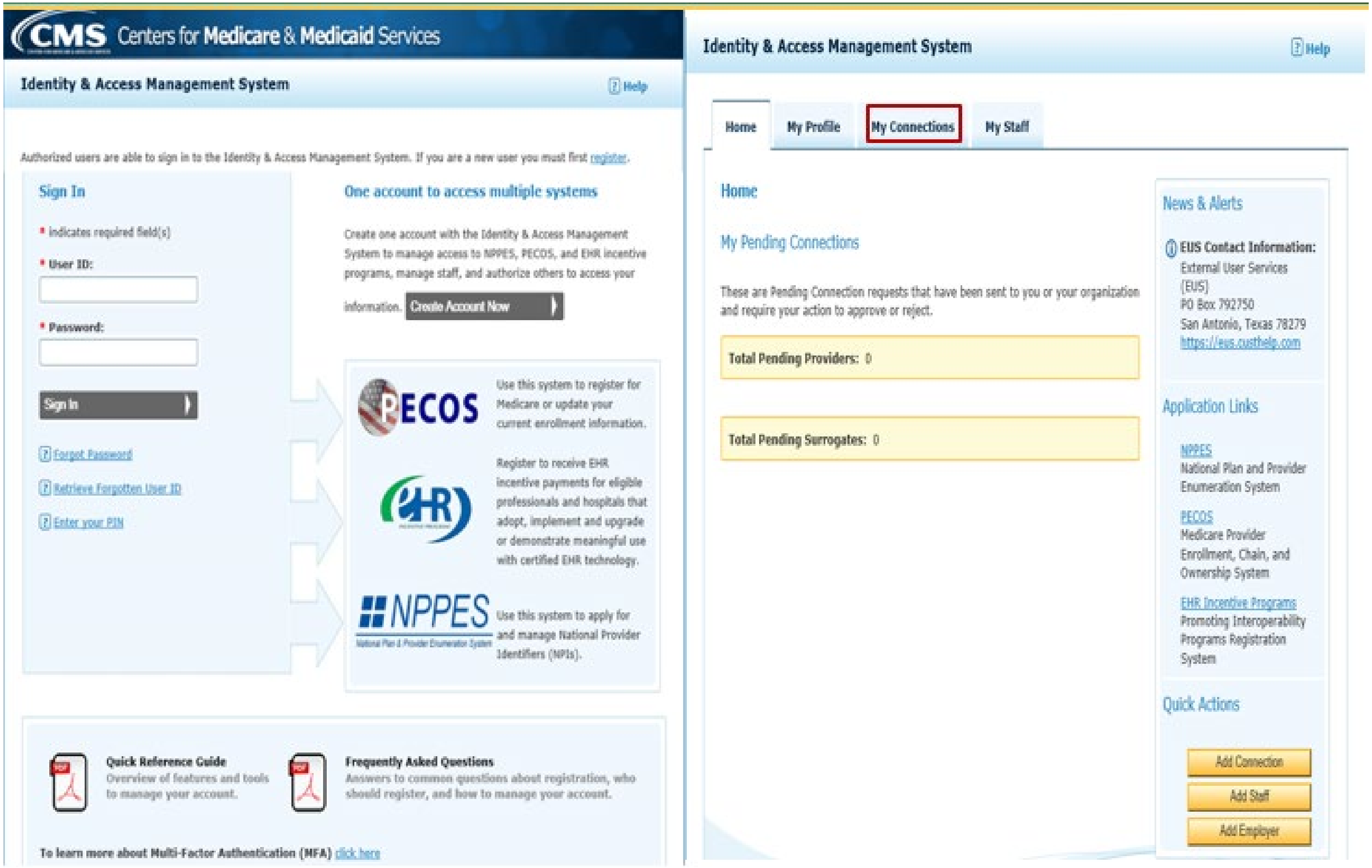
My Profile

Employer Information

Employer ▾	My Role with this Employer ▾	My Status with this Employer ▾	PECOS	EHR	NPPES
⊞ Group Name	Access Manager	Pending Approval Tracking Id xxxxxxxxx	NO	NO	NO
⊞ Doe, John	Authorized Official	Approved	YES	YES	YES
⊞	Staff End User	Approved	NO	NO	YES

My Connections Tab
Authorized Official/Access Manager

My Connection Tab


CMS Centers for Medicare & Medicaid Services
Identity & Access Management System
Help
Sign In
User ID:
Password:
Sign In
Forgot Password
Retrieve Forgotten User ID
Enter your PIN
One account to access multiple systems
Create Account Now
PECOS
EHR
NPPES
National Plan & Provider Enumeration System
Quick Reference Guide
Frequently Asked Questions
Identity & Access Management System
Help
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My Profile
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My Staff
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Application Links
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Add Connection
Add Staff
Add Employer

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

* indicates required field(s)

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

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

Register to receive EHR incentive payments for eligible professionals and hospitals that adopt, implement and upgrade or demonstrate meaningful use with certified EHR technology.

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

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

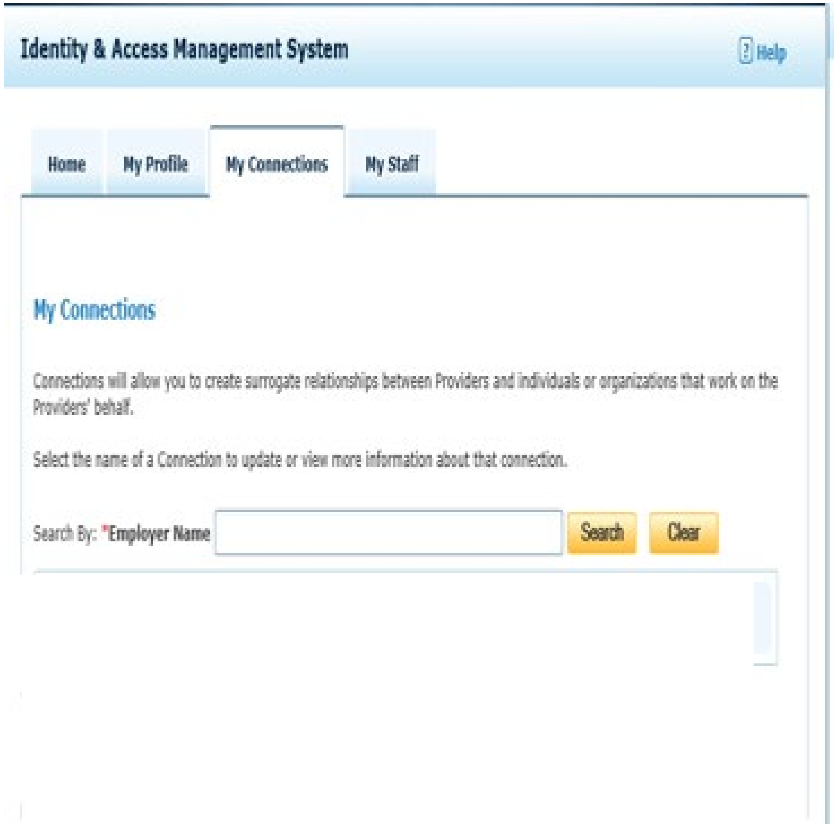
EUS Contact Information:
External User Services (EUS)
PO Box 792750
San Antonio, Texas 78279
https://eus.custhelp.com

NPPES
National Plan and Provider Enumeration System

PECOS
Medicare Provider Enrollment, Chain, and Ownership System

EHR Incentive Programs
Promoting Interoperability Programs Registration System

Find Provider

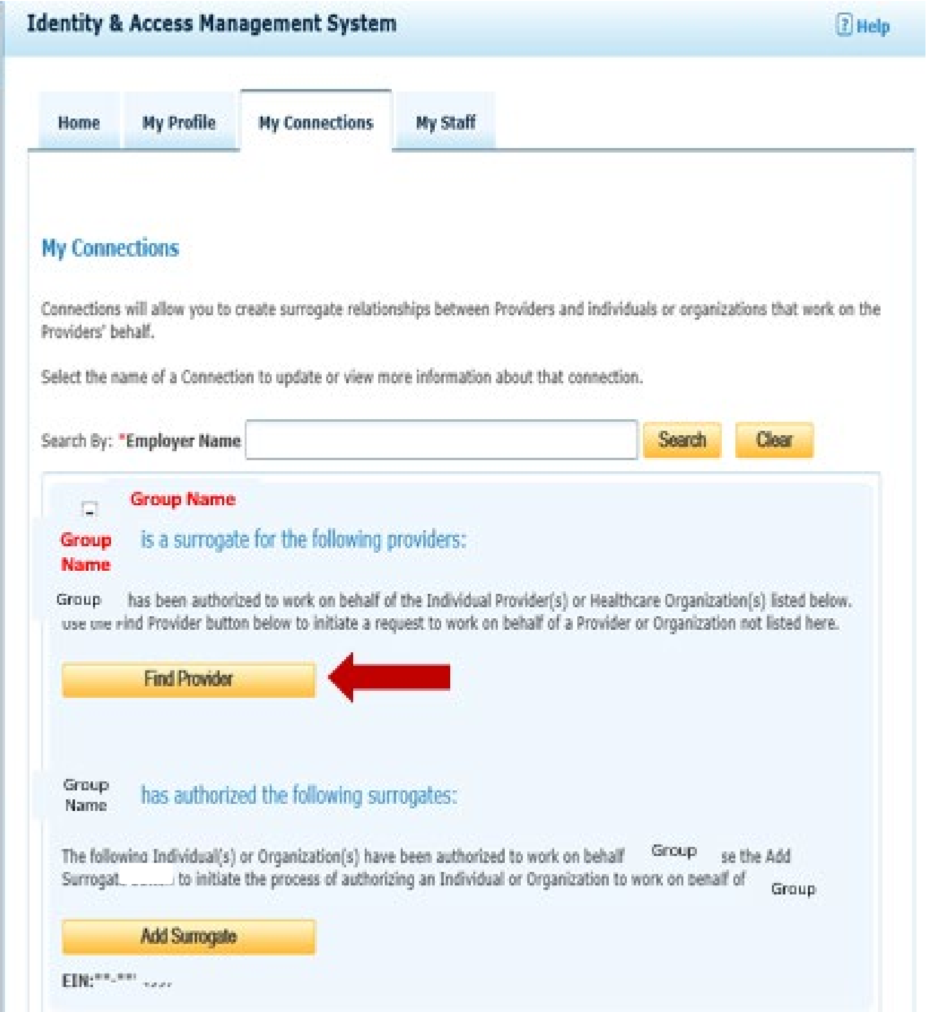

Identity & Access Management System
? Help
Home
My Profile
My Connections
My Staff
Search
Clear

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**


Identity & Access Management System
? Help
Home
My Profile
My Connections
My Staff
Search
Clear
Find Provider
Add Surrogate

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

Group Name is a surrogate for the following providers:

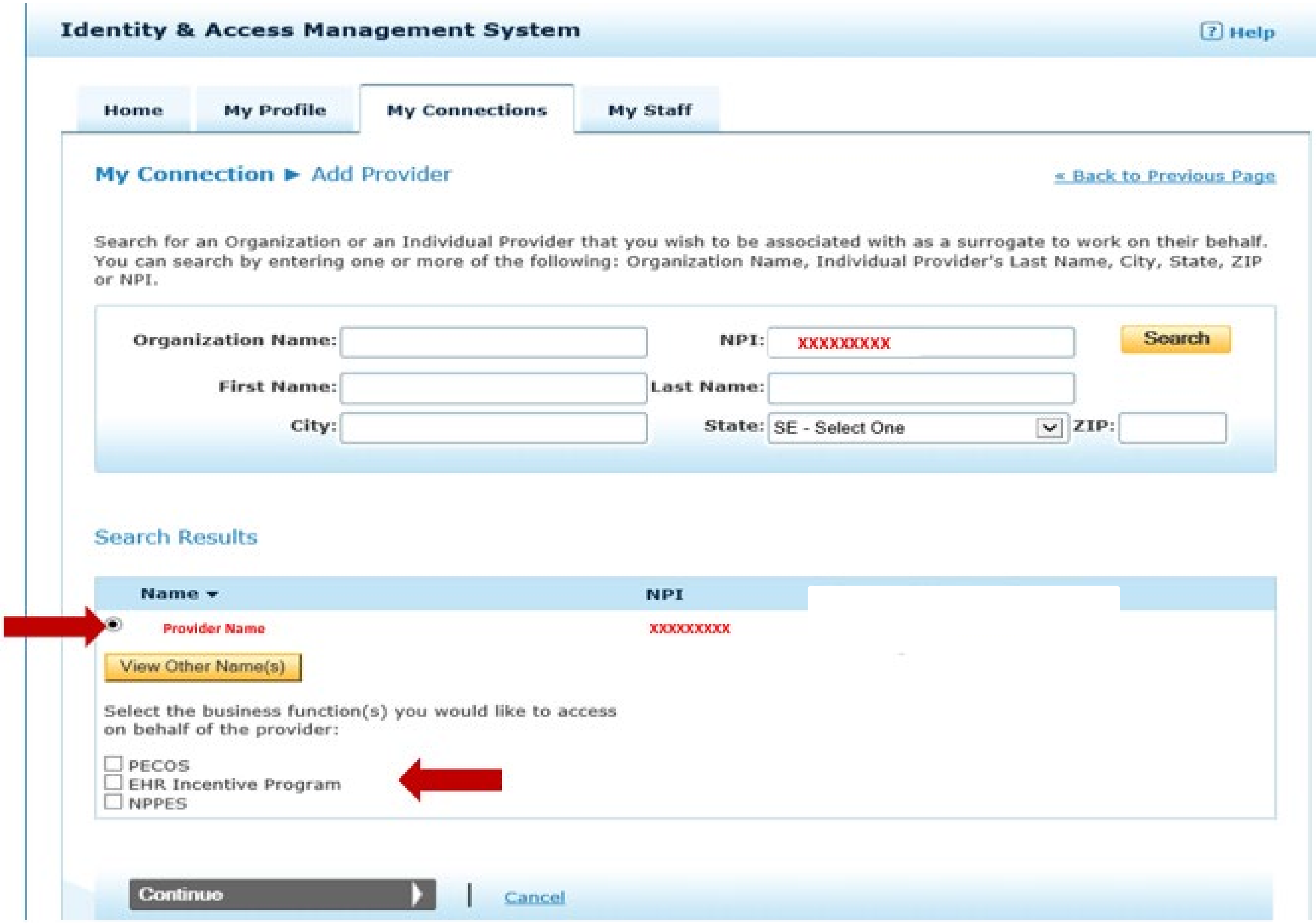
Group has been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed below. use the Find Provider button below to initiate a request to work on behalf of a Provider or Organization not listed here.

Group Name has authorized the following surrogates:

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

EIN:**-**

Search for a Provider


Identity & Access Management System
? Help
Home
My Profile
My Connections
My Staff
« Back to Previous Page
Search
View Other Name(s)
Continue
Cancel

My Connection ► Add Provider

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: XXXXXXXXXX
First Name:
Last Name:
City:
State: SE - Select One
ZIP:

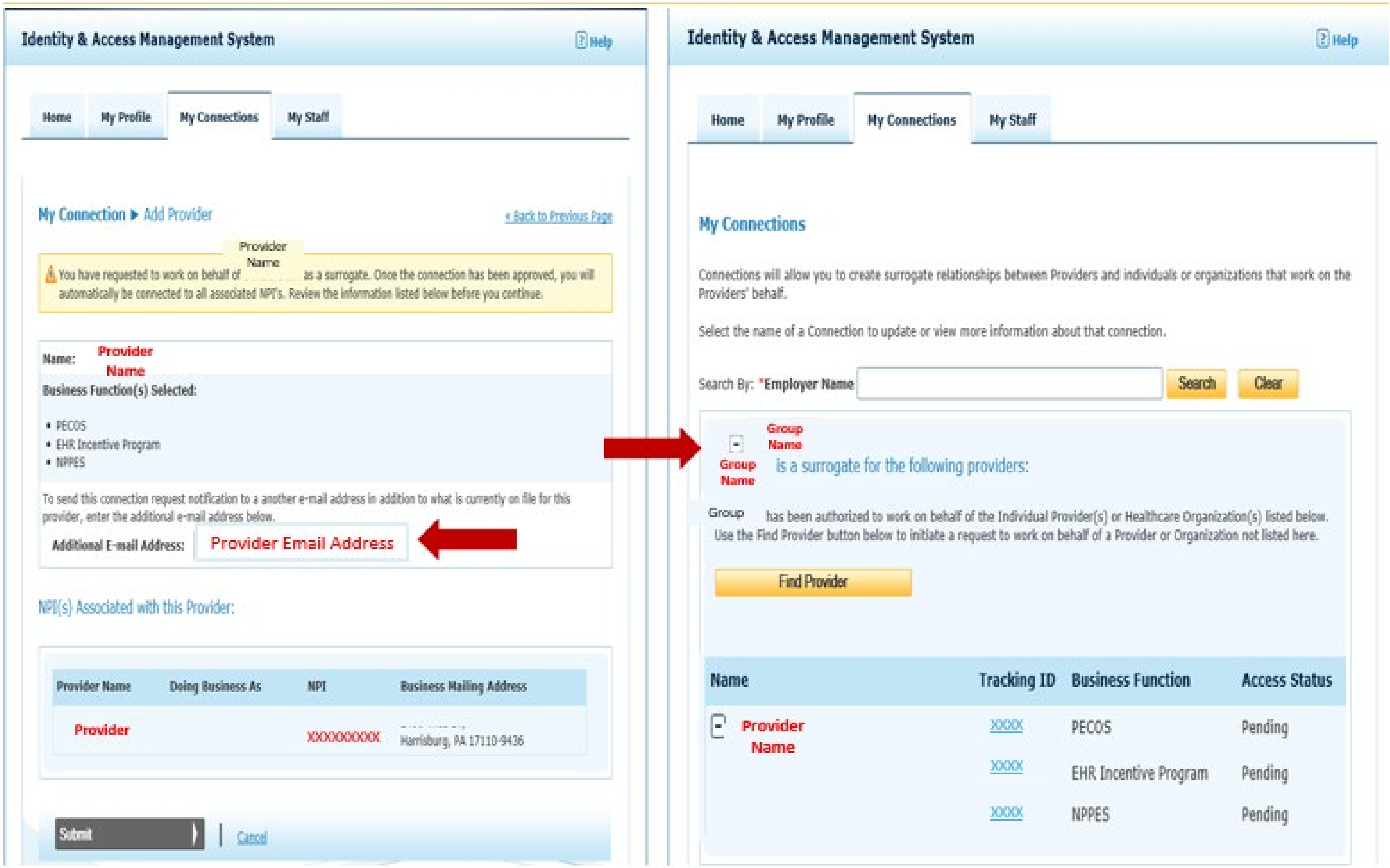
Search Results

	Name	NPI
●	Provider Name	XXXXXXXXXX

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
Help
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: Provider Email Address

NPI(s) Associated with this Provider:

Provider Name	Doing Business As	NPI	Business Mailing Address
Provider		XXXXXXXXXX	Harrisburg, PA 17110-9436

Submit
Cancel
Identity & Access Management System
Help
Home
My Profile
My Connections
My Staff

My Connections

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

Search By: ***Employer Name**

Search
Clear

Group Name

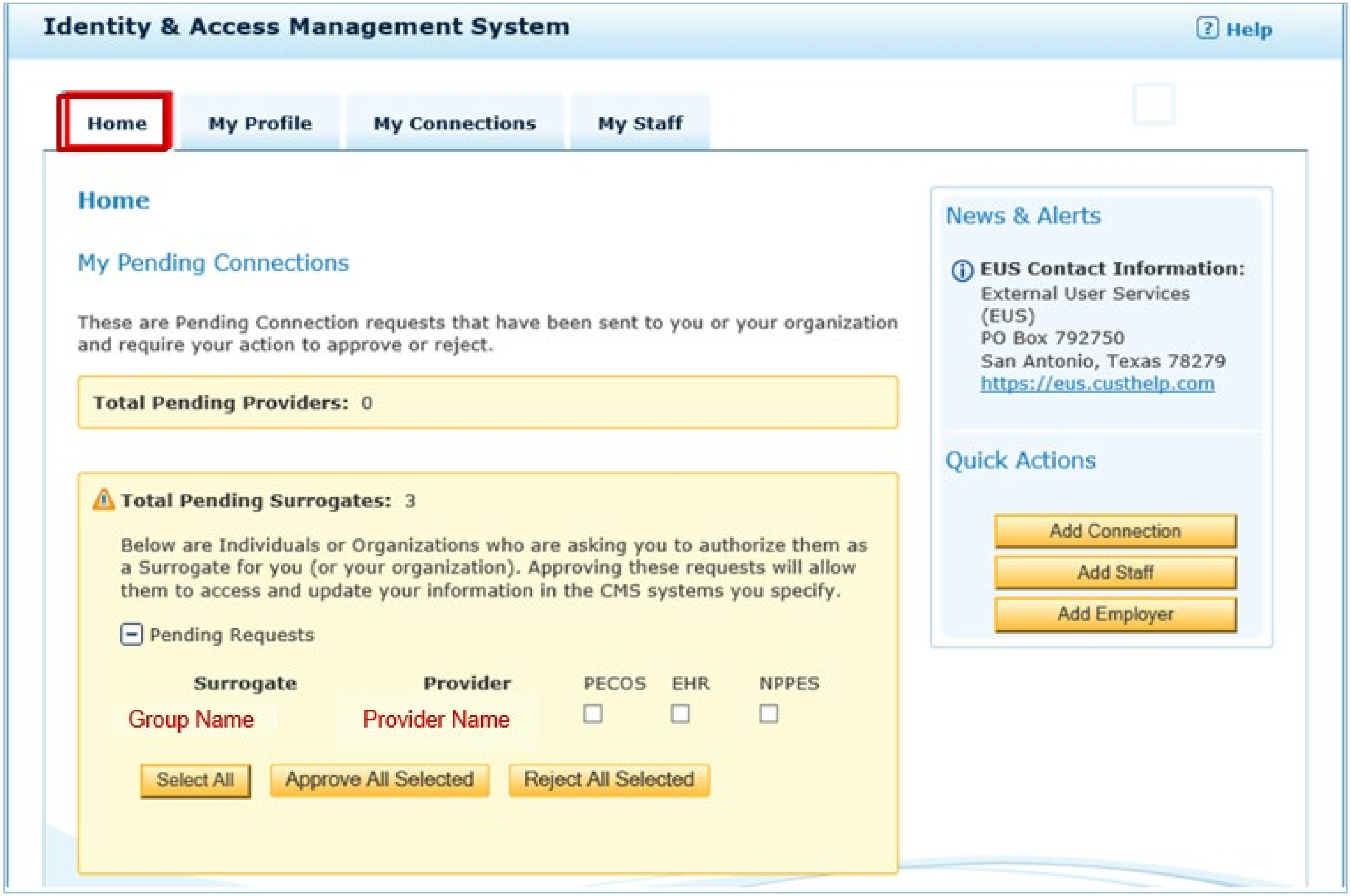
Group Name is a surrogate for the following providers:

Group 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

Name	Tracking ID	Business Function	Access Status
Provider Name	XXXX	PECOS	Pending
	XXXX	EHR Incentive Program	Pending
	XXXX	NPPES	Pending

Approval By Provider (Home Tab)



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	NPPES
Group Name	Provider Name	☐	☐	☐

Select All
Approve All Selected
Reject All Selected

News & Alerts

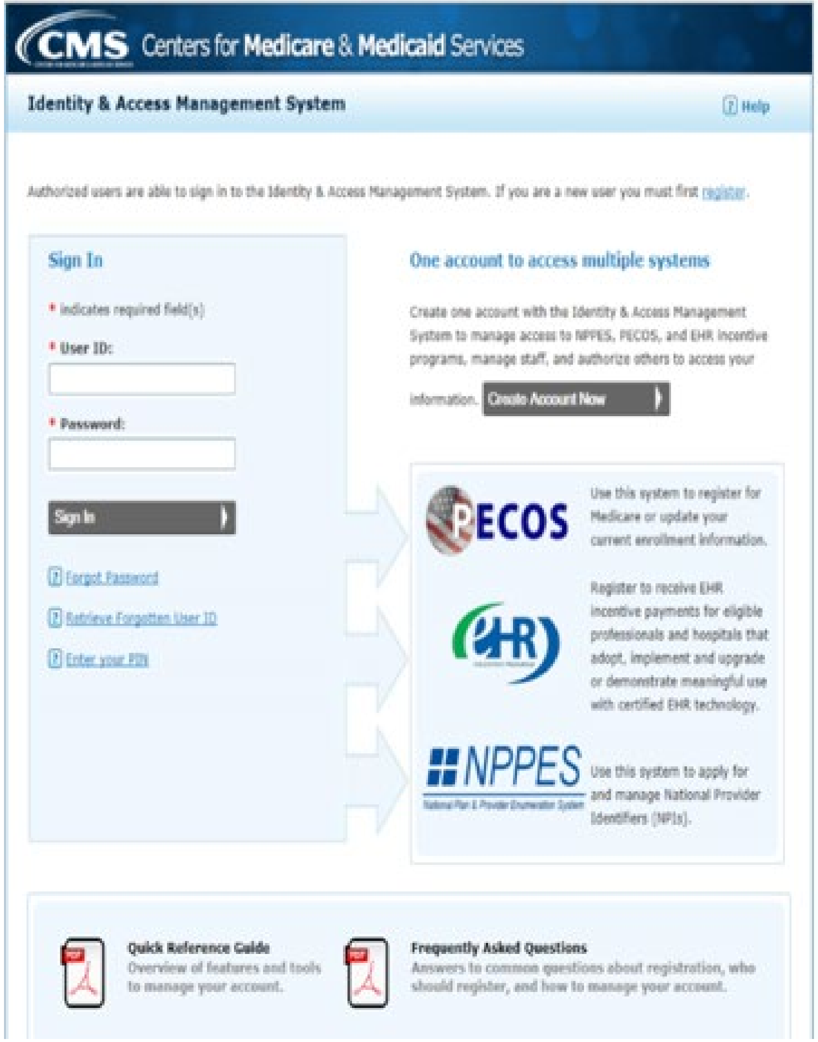
EUS Contact Information:
External User Services (EUS)
PO Box 792750
San Antonio, Texas 78279
https://eus.custhelp.com

Quick Actions

Add Connection
Add Staff
Add Employer

My Connections Tab
Individual Provider

My Connection Tab – Provider


CMS Centers for Medicare & Medicaid Services
Identity & Access Management System
Help
Sign In
User ID:
Password:
Sign In
Forgot Password
Retrieve Forgotten User ID
Enter your PIN
Create Account Now
PECOS
EHR
NPPES
National Plan & Provider Enumeration System
Quick Reference Guide
Frequently Asked Questions

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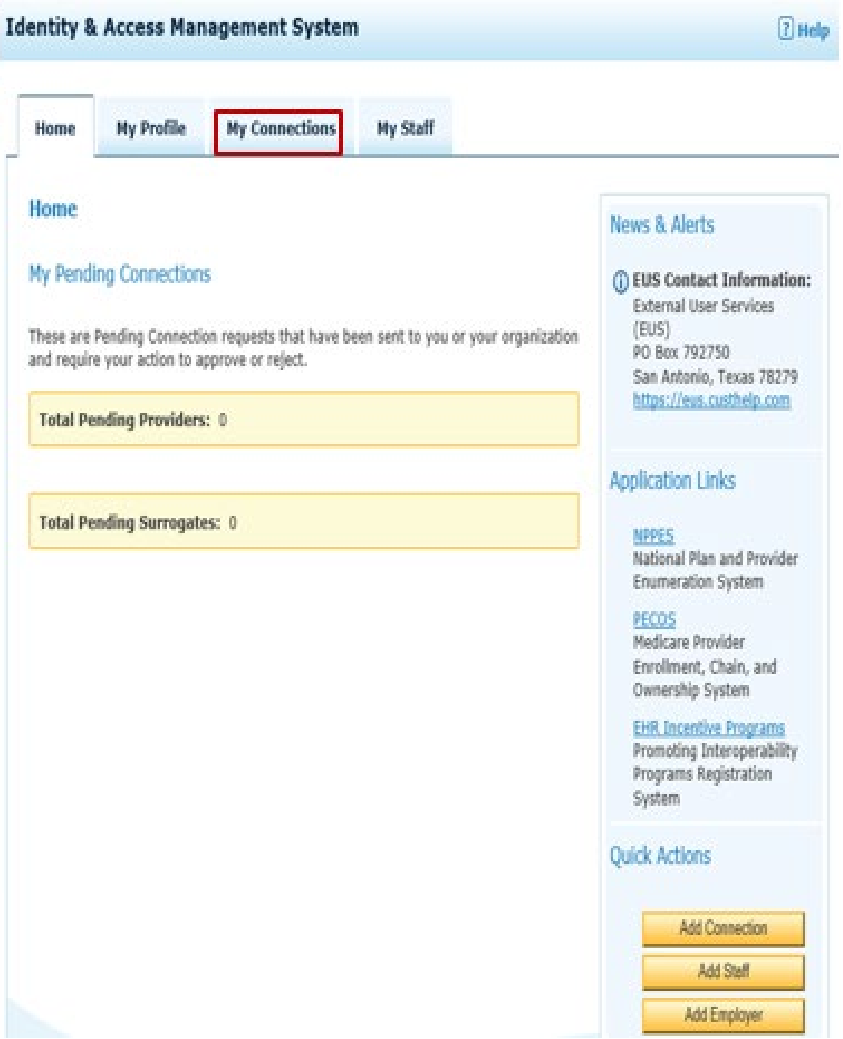
Identity & Access Management System
Help
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My Profile
My Connections
My Staff
Home
My Pending Connections
News & Alerts
Application Links
Quick Actions
Add Connection
Add Staff
Add Employer

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

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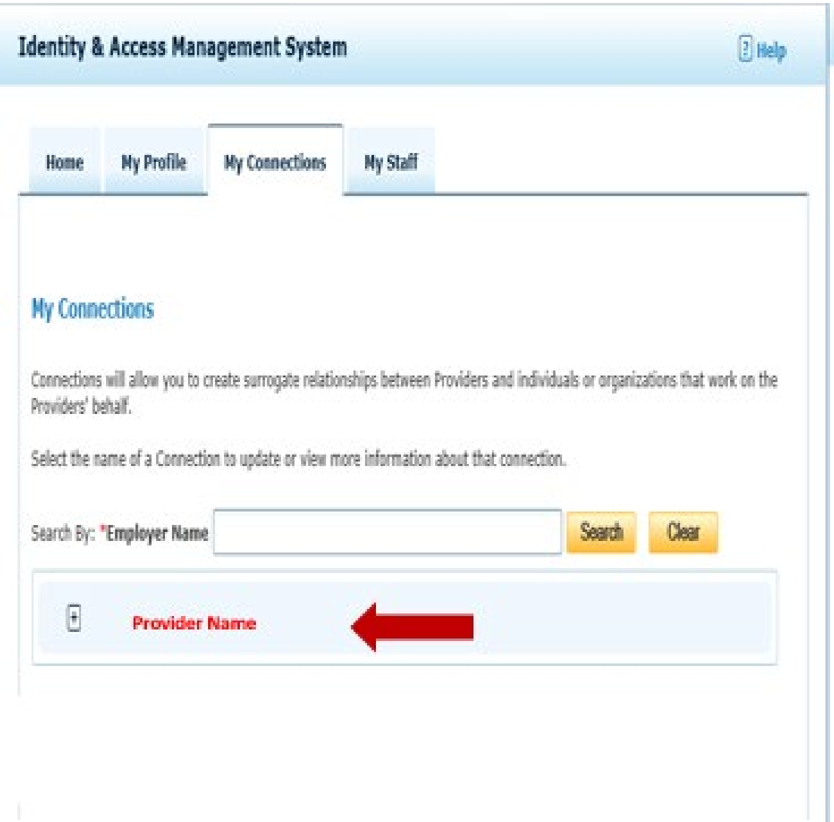
San Antonio, Texas 78279
https://eus.custhelp.com

NPPES
National Plan and Provider Enumeration System

PECOS
Medicare Provider Enrollment, Chain, and Ownership System

EHR Incentive Programs
Promoting Interoperability Programs Registration System

Add Surrogate



Identity & Access Management System

Help
Home
My Profile
My Connections
My Staff

My Connections

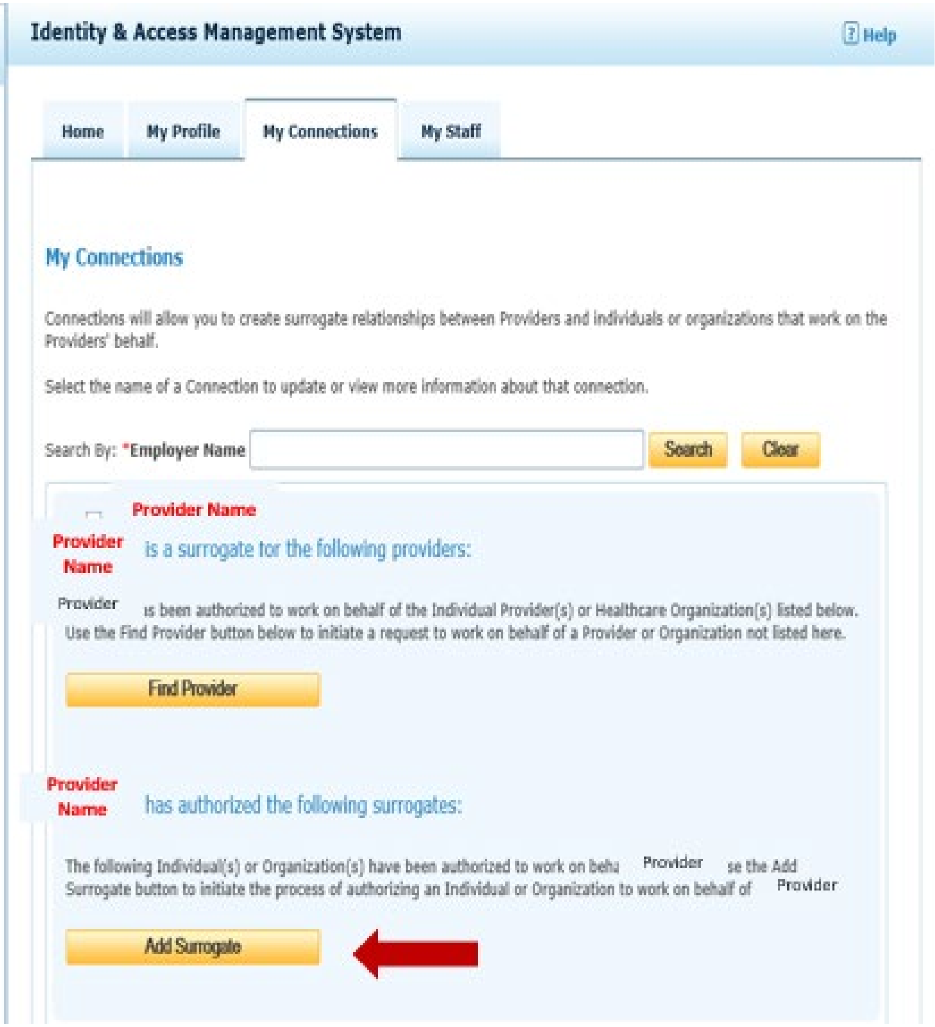
Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.

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

Provider Name is a surrogate for the following providers:

Provider 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.

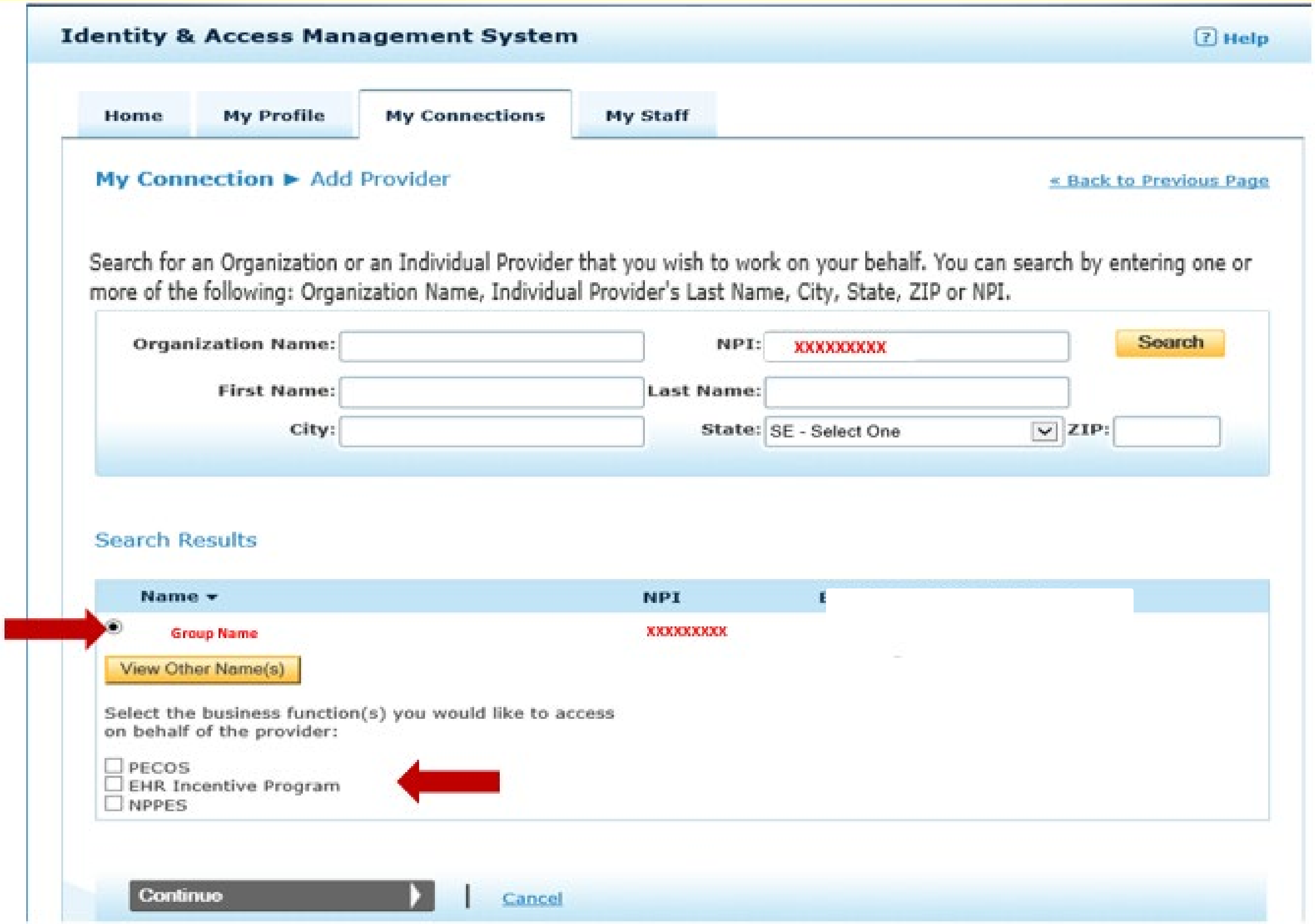
Find Provider

Provider Name has authorized the following surrogates:

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

Add Surrogate

Search for a Group


Identity & Access Management System
Help
Home
My Profile
My Connections
My Staff
« Back to Previous Page
Search
View Other Name(s)
Continue
Cancel

My Connection ► Add Provider

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:**	XXXXXXXXXX
First Name:		**Last Name:**	
City:		**State:**	SE - Select One
		ZIP:	

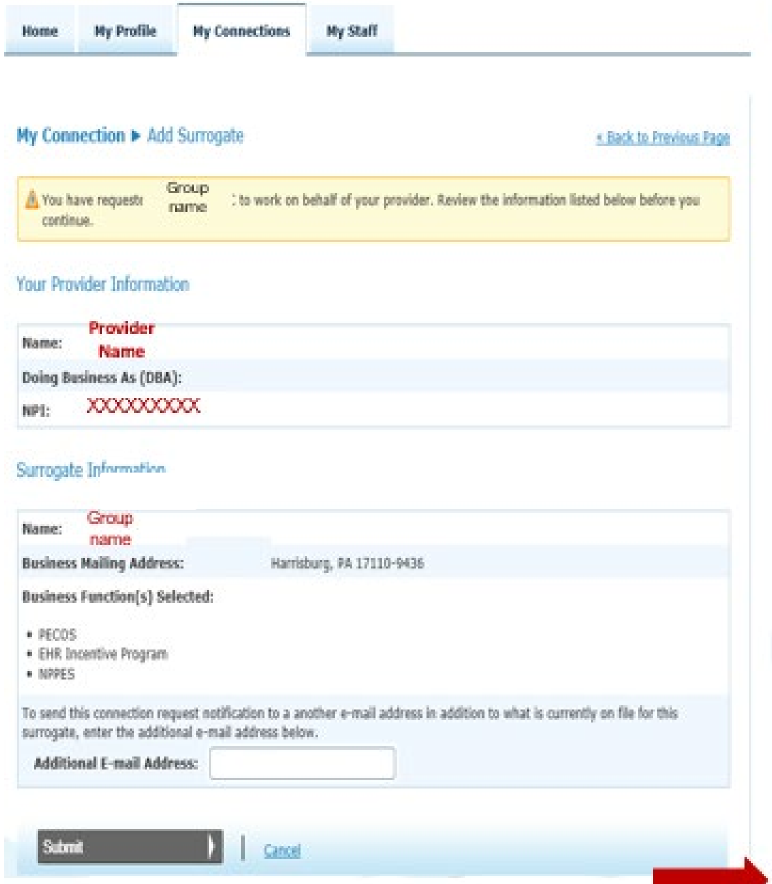
Search Results

	Name	NPI
●	Group Name	XXXXXXXXXX

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



My Connection ▶ Add Surrogate

« Back to Previous Page

⚠ You have requests 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: XXXXXXXXX

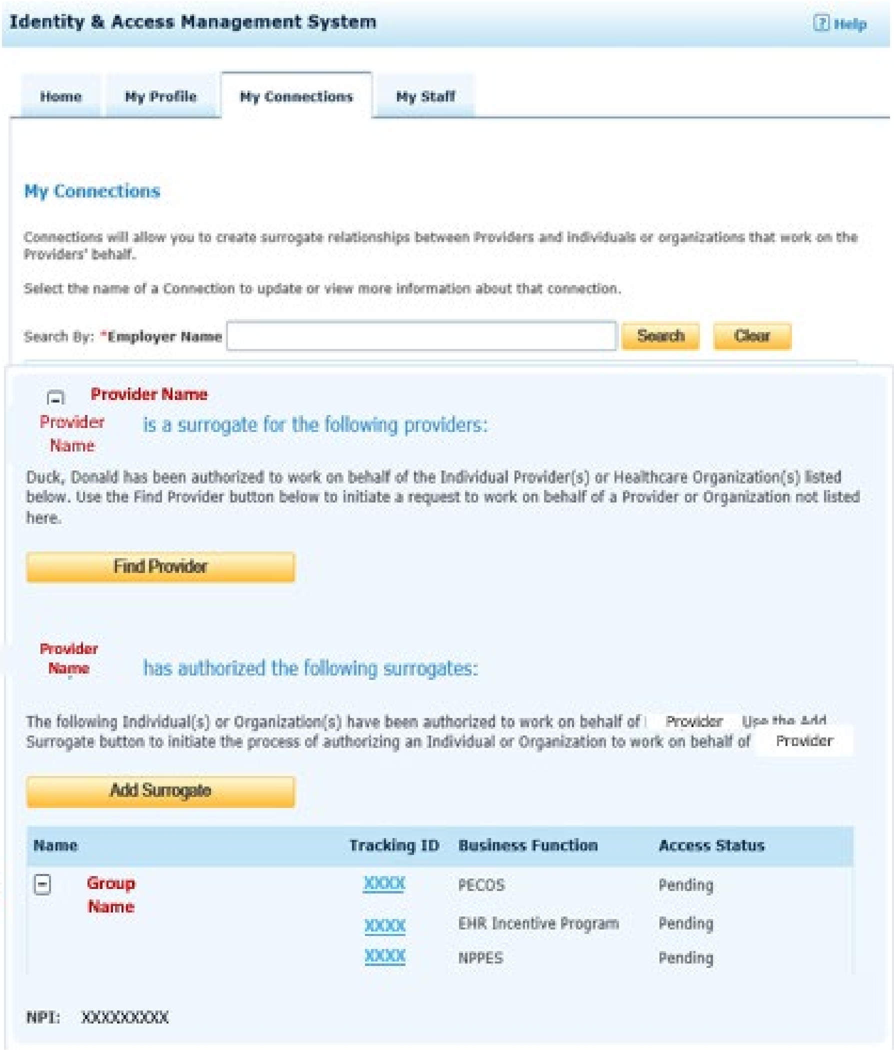
Surrogate Information

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:



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.

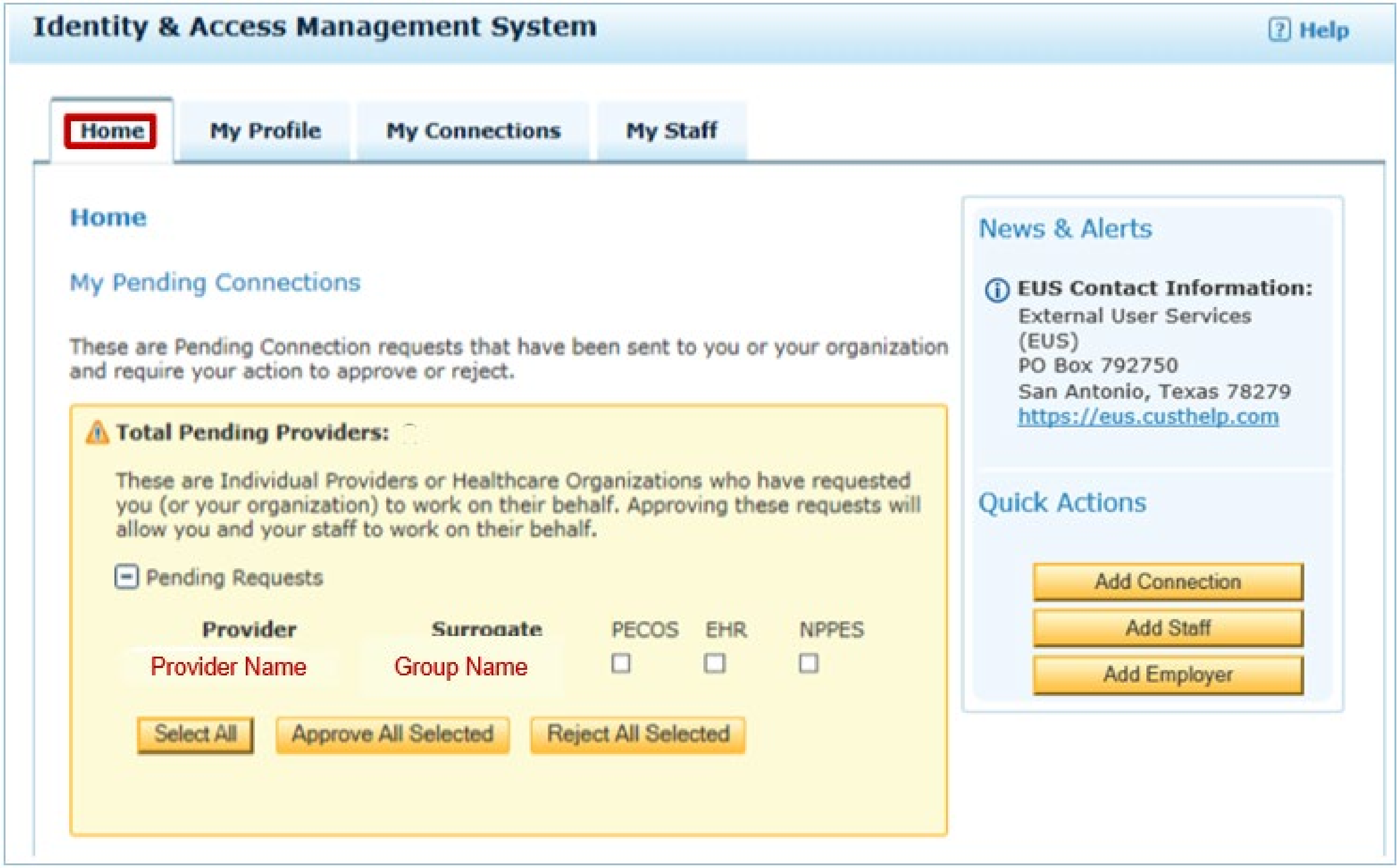
Provider Name has authorized the following surrogates:

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

Name	Tracking ID	Business Function	Access Status
⊟ Group Name	XXXX	PECOS	Pending
	XXXX	EHR Incentive Program	Pending
	XXXX	NPPES	Pending

NPI: XXXXXXXXX

Approval by Authorized Official/ Access Manager (Home Tab)



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:

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	☐	☐	☐

Select All
Approve All Selected
Reject All Selected

News & Alerts

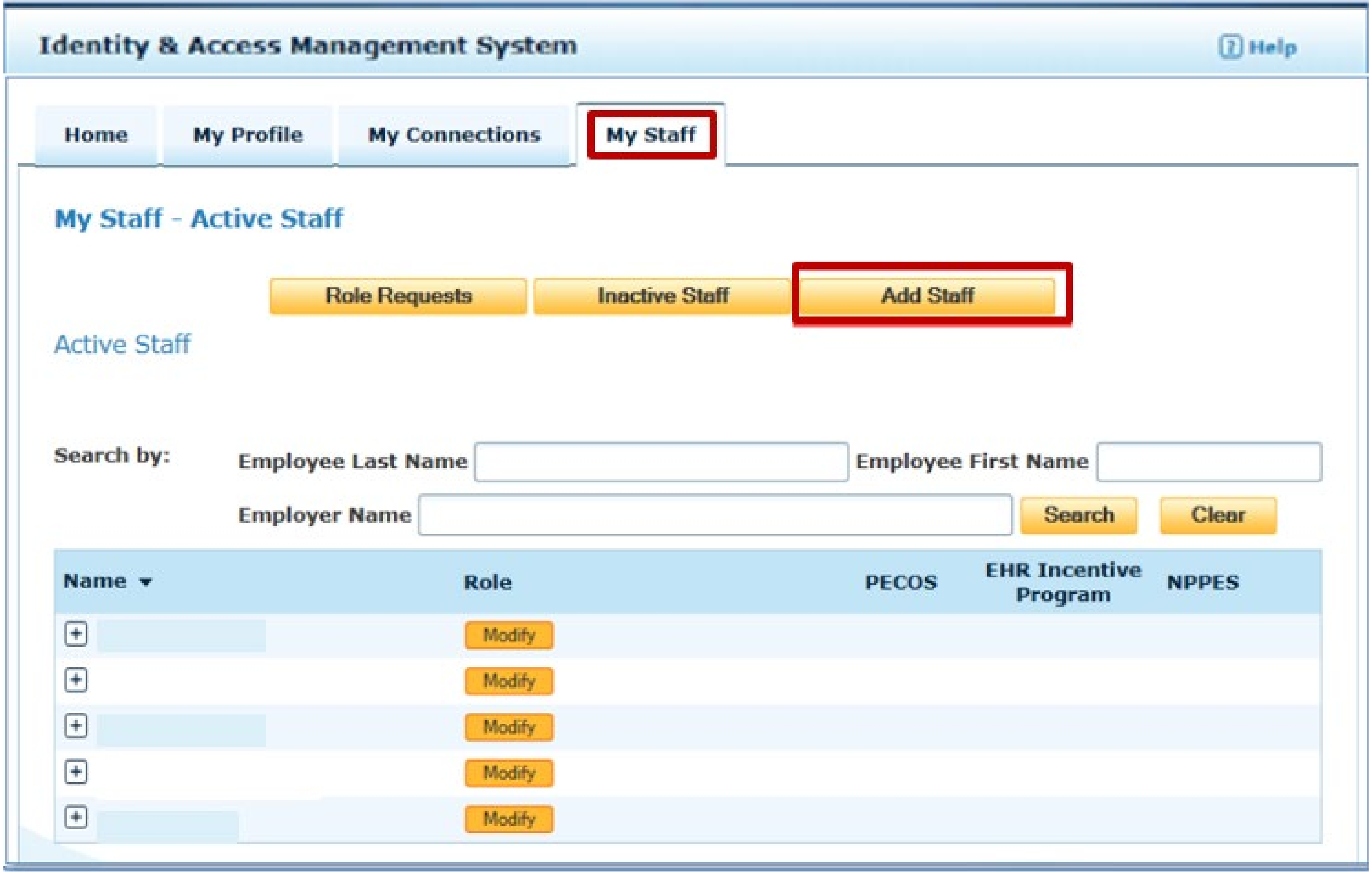
EUS Contact Information:
External User Services (EUS)
PO Box 792750
San Antonio, Texas 78279
https://eus.custhelp.com

Quick Actions

Add Connection
Add Staff
Add Employer

My Staff Tab
Manage Access

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

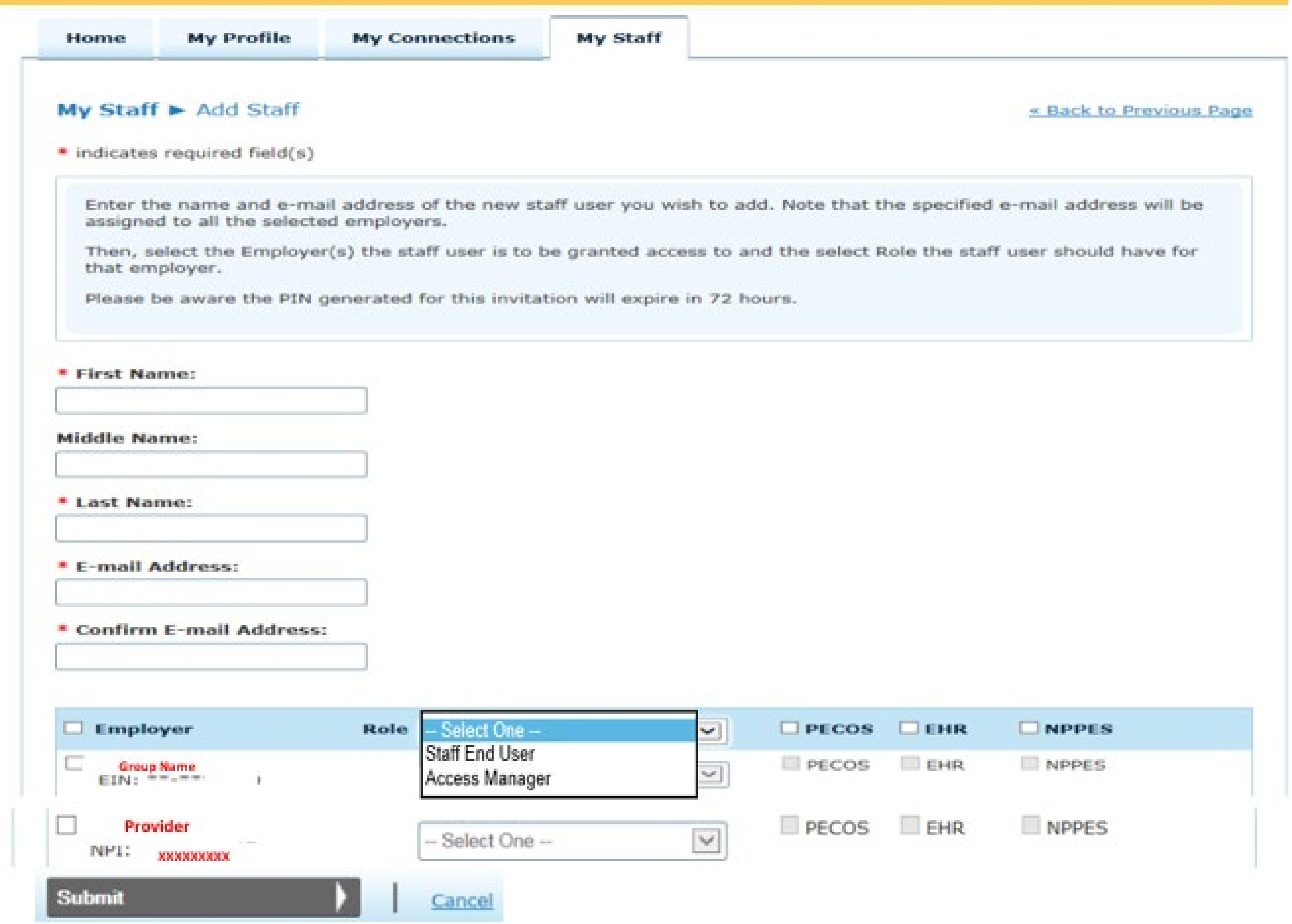
Active Staff

Search by: Employee Last Name ___ Employee First Name ___

Employer Name ___ Search | Clear

Name ▾	Role	PECOS	EHR Incentive Program	NPPES
⊞	Modify			
⊞	Modify			
⊞	Modify			
⊞	Modify			
⊞	Modify			

Add Staff


Home
My Profile
My Connections
My Staff
« Back to Previous Page
-- Select One --
Staff End User
Access Manager
-- Select One --
Submit
Cancel

My Staff ► Add Staff

* 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:

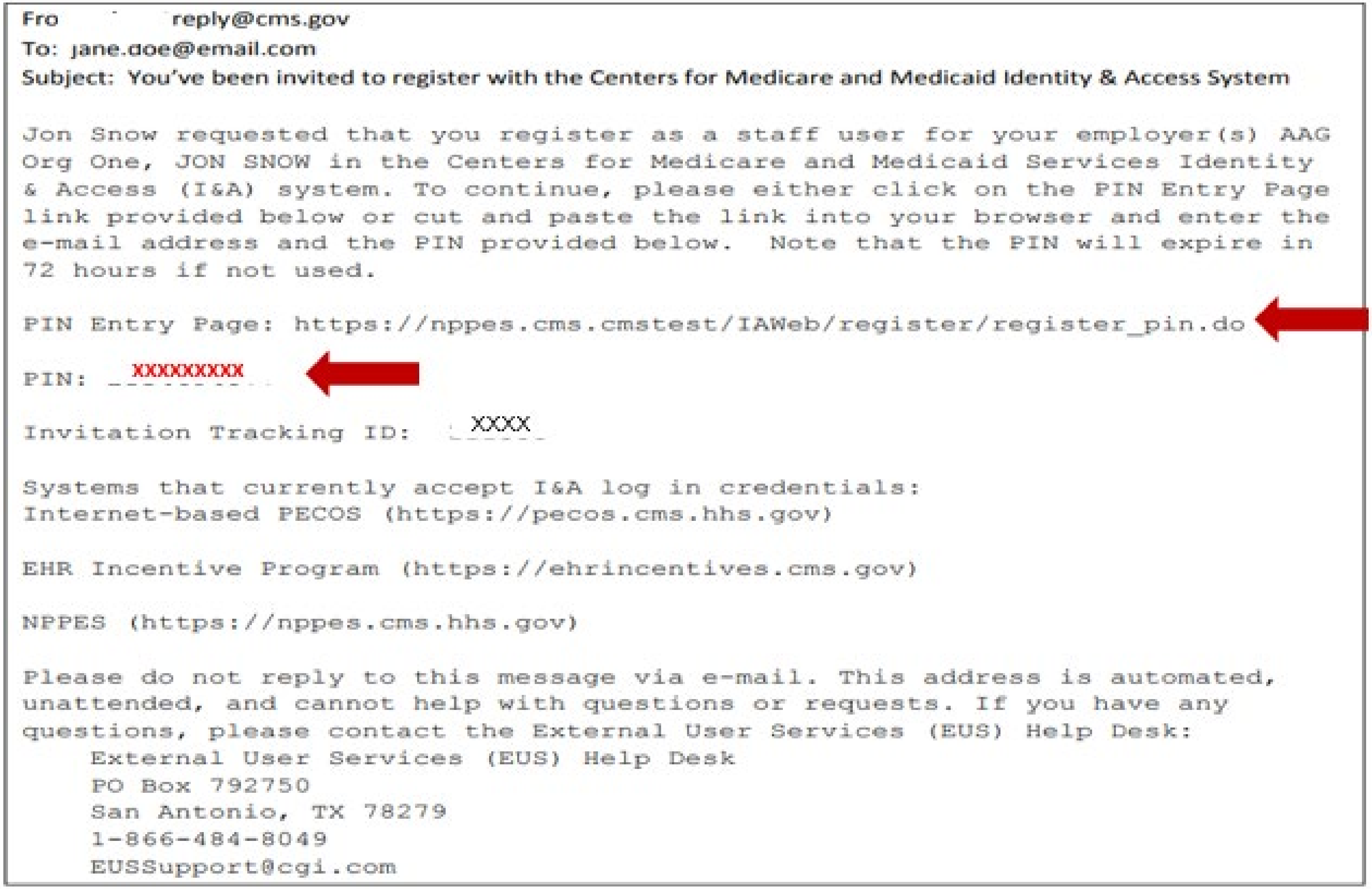
*** Last Name:**

*** E-mail Address:**

*** Confirm E-mail Address:**

☐ Employer	Role	☐ PECOS	☐ EHR	☐ NPPES
☐ Group Name EIN: **-***		☐ PECOS	☐ EHR	☐ NPPES
☐ Provider NPI: XXXXXXXXX	-- Select One --	☐ PECOS	☐ EHR	☐ NPPES

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: XXXXXXXXXX

Invitation Tracking ID: XXXX

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

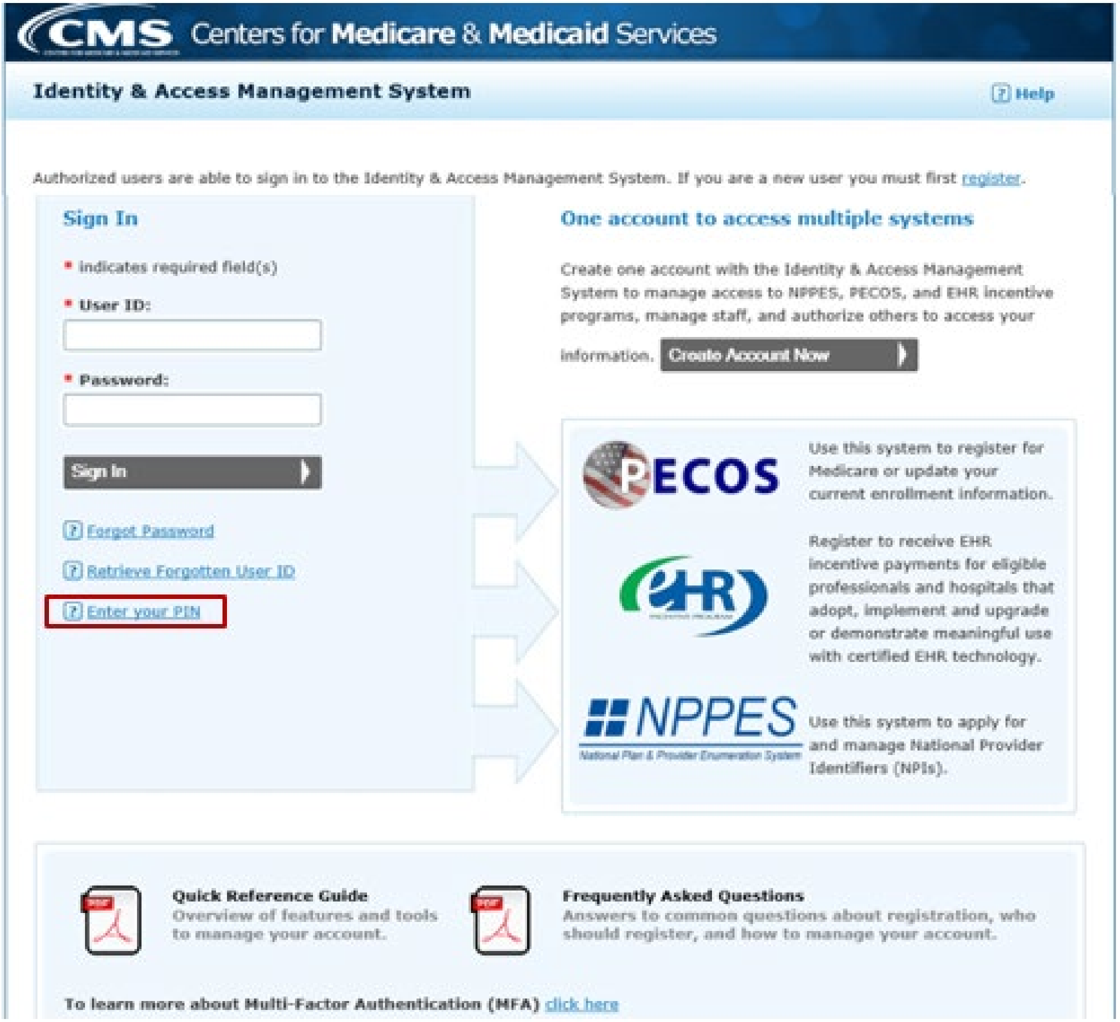
EHR Incentive Program (https://ehrincentives.cms.gov)

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
Help
Sign In
Create Account Now
PECOS
EHR
NPPES
National Plan & Provider Enumeration System

Identity & Access Management System

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:**

Forgot Password

Retrieve Forgotten User ID

Enter your PIN

One account to access multiple systems

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Register to receive EHR incentive payments for eligible professionals and hospitals that adopt, implement and upgrade or demonstrate meaningful use with certified EHR technology.

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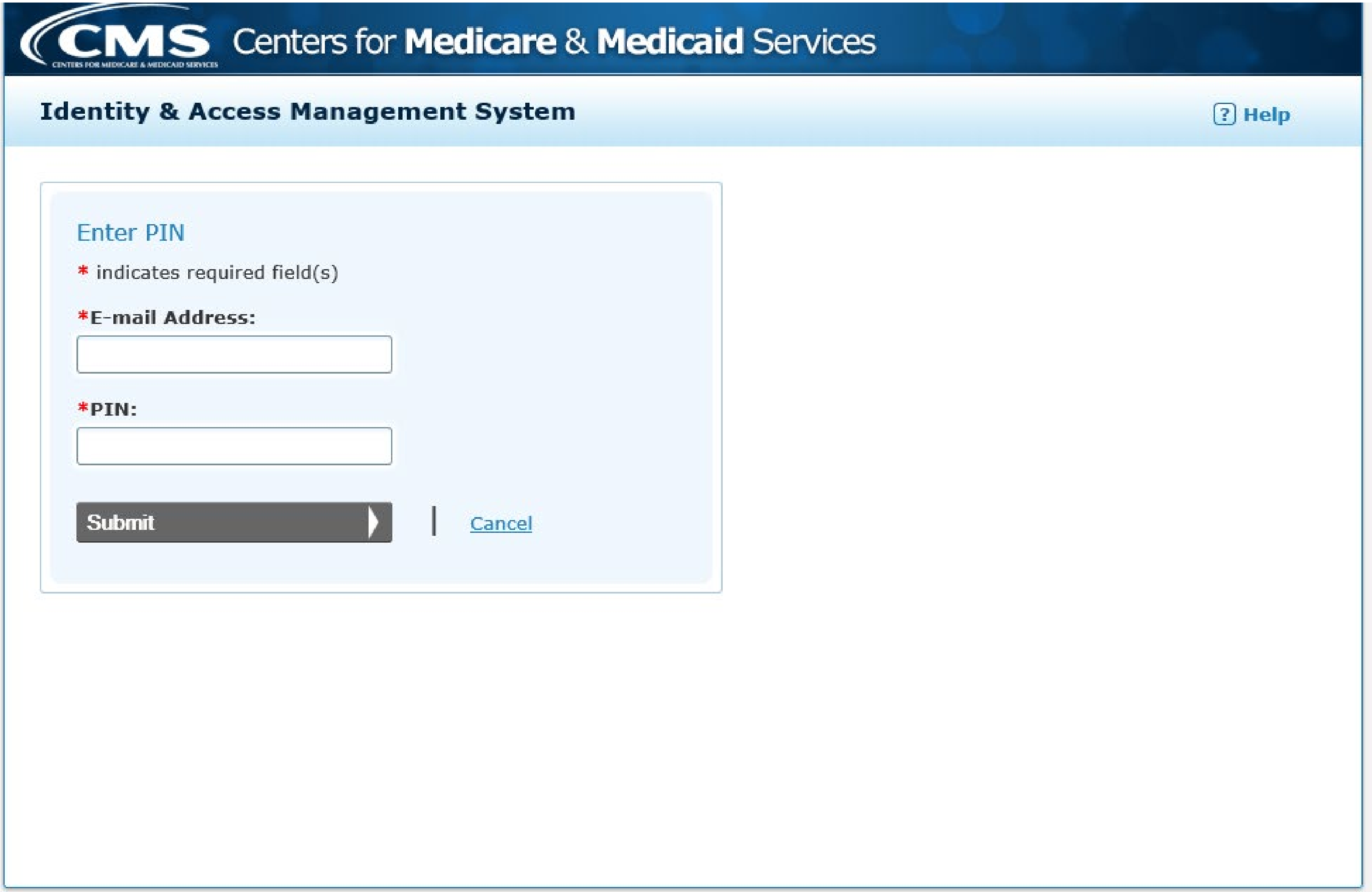
Enter Email and PIN



CMS Centers for Medicare & Medicaid Services

Identity & Access Management System

? Help

Enter PIN

* indicates required field(s)

*E-mail Address:

*PIN:

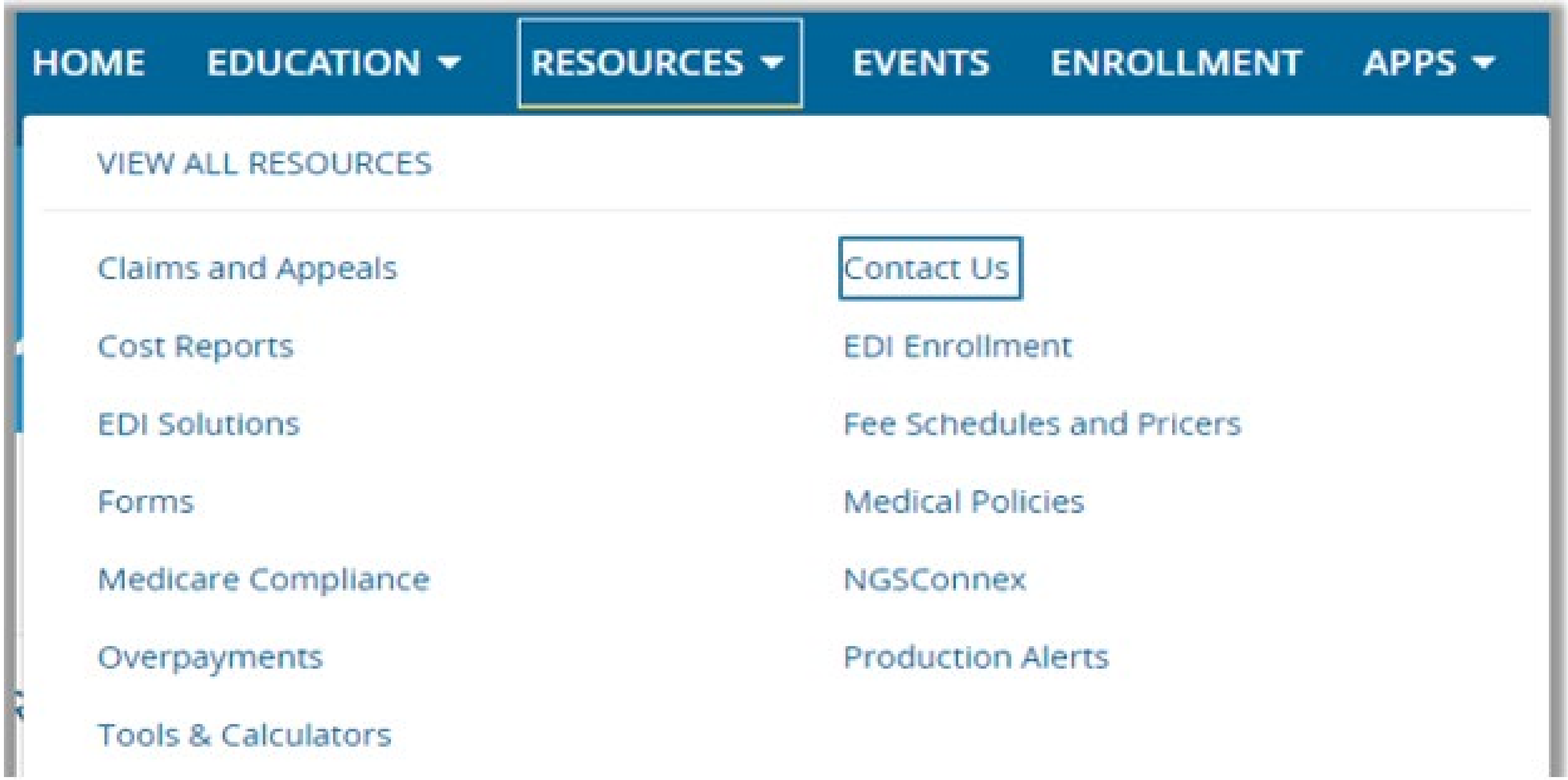
Submit
Cancel

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/

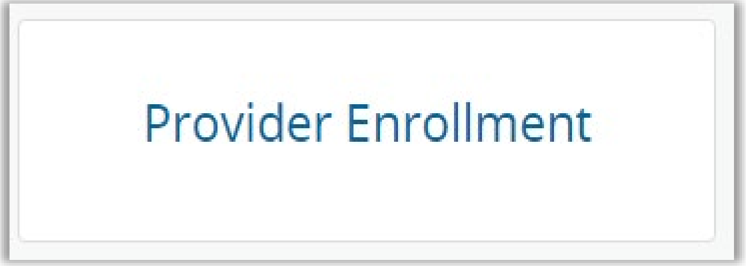
NGS Website



HOME EDUCATION RESOURCES EVENTS ENROLLMENT APPS

VIEW ALL RESOURCES

- Claims and Appeals
- Cost Reports
- EDI Solutions
- Forms
- Medicare Compliance
- Overpayments
- Tools & Calculators
- Contact Us
- EDI Enrollment
- Fee Schedules and Pricers
- Medical Policies
- 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

Thank You!

- Follow-up email
  - Attendees will be provided a Medicare University Course Code
- Questions?

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FOLLOW US