

# Getting Access to PECOS

9/5/2023



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# Today's Presenters

## 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

Name/LBN	NPI	Status	Tracking ID	Action
Provider	XXXXXXXXXX	PENDING E-SIGNATURES <a href="#">View Pending E-Signatures Application</a>	TXXXXXX	<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>	TXXXXXX	<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

Enrollment Status  
All Statuses

Relationship Status  
All Relationships

[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.

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](#)

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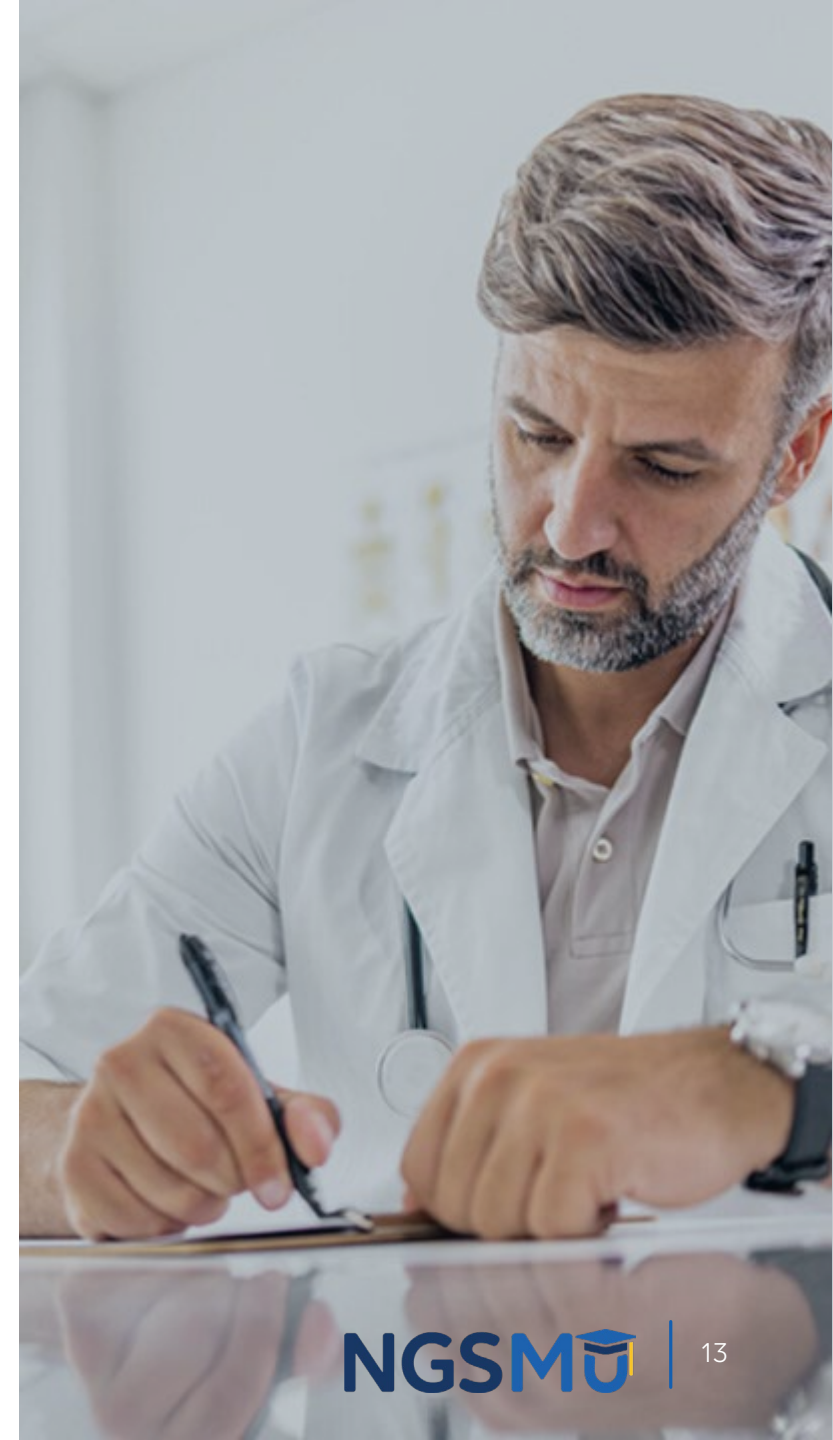
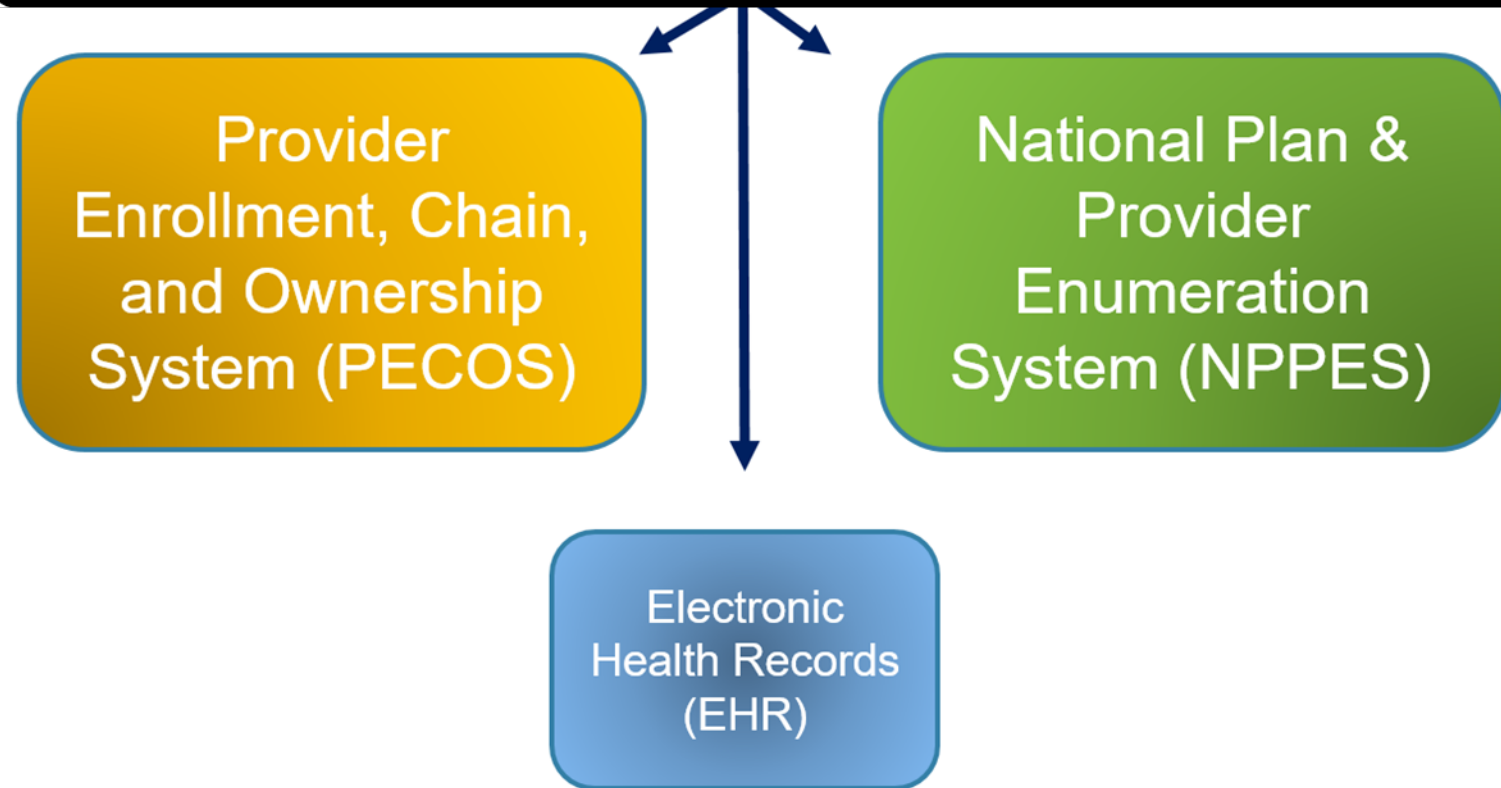
# Learn About PECOS

- 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

**CMS** Centers for Medicare & Medicaid Services

## Identity & Access Management System

[Help](#)

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, PECOS, and EHR incentive programs, manage staff, and authorize others to access your information. **Create Account Now**

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 Forgotten User ID



# Retrieve Forgotten User ID

## Identity & Access Management System

Help

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\* Indicates required field(s)

\* **User ID:**

\* **Password:**

**Sign In**


[? Forgot Password](#)

[? Retrieve Forgotten User ID](#)


[? Enter your PIN](#)

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

# 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: XXXXXXXXX

[Continue to Change Password](#)

# Reset Password

 Centers for Medicare & Medicaid Services

Identity & Access Management System [Help](#)

Reset Password [« Back to Previous Page](#)

\* indicates required field(s)

\* 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: @ # & ) ( - \_ ' " . , \* ; : / \$ !

Reset

Cancel



The background is a solid dark blue. On the right side, there are large, overlapping, semi-transparent blue geometric shapes, including a large 'S' or 'R' curve and a diagonal band. In the bottom-left corner, there is a pattern of small, light blue dots arranged in a grid-like fashion.

# Create Your Account

# Create Account Now



**CMS** Centers for Medicare & Medicaid Services

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

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, PECOS, and EHR Incentive programs, manage staff, and authorize others to access your information. [Create Account Now](#)

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

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


**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](#)


# User Registration

 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:

| [Cancel](#)

 **Quick Reference Guide**

 **Frequently Asked Questions**

Overview of features and tools to manage your account.

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:

\* Question 1:

Select

\* Question 2:

Select

\* Question 3:

Select

\* Question 4:

Select

\* Question 5:

Select


\* Answer 1:

\* Answer 2:

\* Answer 3:

\* Answer 4:

\* Answer 5:

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# 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> <input type="text" value="United States"/>
<b>Fax Number:</b> <input type="text"/>	<b>* State/ Province/ Territory:</b> <input type="text" value="SE - Select One"/>
<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	

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

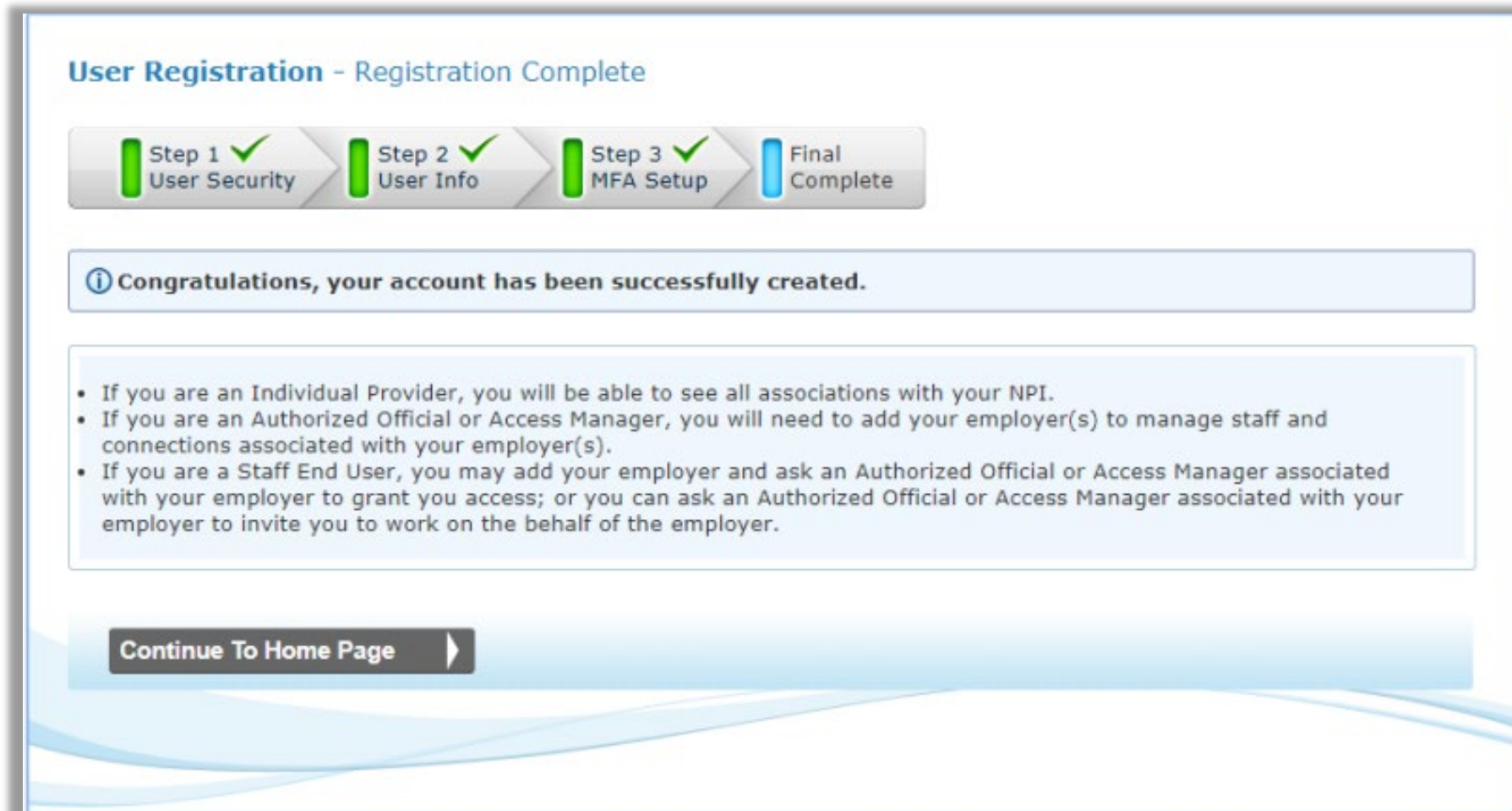
Phone Number Text/SMS

E-mail Address

Phone Number Voice Call

Continue | Cancel

# Registration Complete



The screenshot shows a web interface for user registration completion. At the top, the title 'User Registration - Registration Complete' is displayed. Below it is a progress bar with four steps: 'Step 1 User Security', 'Step 2 User Info', 'Step 3 MFA Setup', and 'Final Complete'. The first three steps are marked with green checkmarks and green bars, while the final step is marked with a blue bar. A light blue message box contains the text 'Congratulations, your account has been successfully created.' Below this, a list of instructions is provided for different user roles. At the bottom, there is a dark grey button labeled 'Continue To Home Page' with a right-pointing arrow.

**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

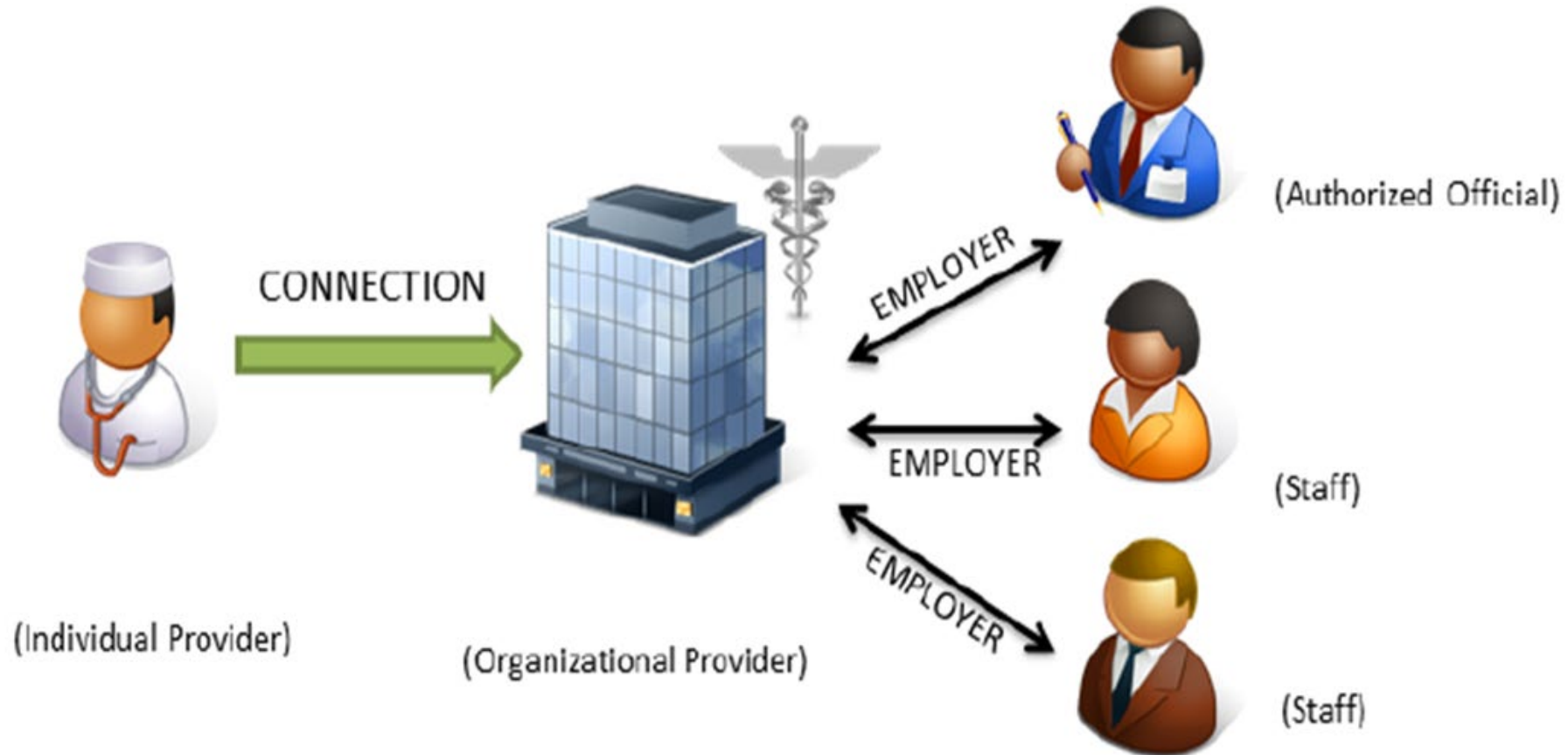


# Roles

Role	Represent an Organization	Manage Staff	Approve/ Manage Connections	Act on Behalf of Provider in CMS systems
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

**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:

NPI:

First Name:

Last Name:

City:

State:

SE - Select One

ZIP:

# Search Results

**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:

First Name:

Last Name:

City:

State:

☒

ZIP:

**Search Results**

	Name	Doing Business As	NPI	View NPI	View Other Name
<input type="radio"/>	Group Name		XXXXXXXX	<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](#)

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:

XXXXXXXXXX

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 --

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

**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 --

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)

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

**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:

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

Identity & Access Management System

Help

Home

My Profile

My Connections

My Staff

My Profile > Add Employer > Confirmation and Review

[Back to Previous Page](#)

[Print this page](#)

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 [for 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
		Access Manager	<input type="button" value="Approve"/> <input type="button" value="Reject"/>
		Staff End User	<input type="button" value="Approve"/> <input type="button" value="Reject"/>

The background is a dark blue gradient. On the right side, there are large, overlapping, semi-transparent blue geometric shapes, including a large 'S' or 'R' curve. On the left side, there is a pattern of small, light blue dots arranged in a grid-like fashion.

Initiate a Connection Request to a  
Provider

# My Connection Tab

The screenshot displays the CMS Identity & Access Management System interface. The left sidebar contains a 'Sign In' section with fields for 'User ID' and 'Password', a 'Sign In' button, and links for 'Forgot Password', 'Retrieve Forgotten User ID', and 'Enter your PIN'. Below this is a 'One account to access multiple systems' section with a 'Create Account Now' button. The main content area is titled 'My Connections' and shows 'My Pending Connections' with two yellow boxes indicating 'Total Pending Providers: 0' and 'Total Pending Surrogates: 0'. The right sidebar includes 'News & Alerts' with 'EUS Contact Information', 'Application Links' for NPPES, PECOS, and EHR Incentive Programs, and 'Quick Actions' with buttons for 'Add Connection', 'Add Staff', and 'Add Employer'.

**CMS** Centers for Medicare & Medicaid Services

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:

**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, PECOS, and EHR incentive programs, manage staff, and authorize others to access your information. **Create Account Now**

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

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

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

**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: 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**

**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](#)

# Find Provider

The image displays two screenshots of the Identity & Access Management System interface, specifically the 'My Connections' section.

**Left Screenshot:** The 'My Connections' page is shown. It includes a navigation bar with 'Home', 'My Profile', 'My Connections', and 'My Staff'. Below the navigation bar, there is a section titled 'My Connections' with a description: 'Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.' Below this, there is a search bar labeled 'Search By: \*Employer Name' with 'Search' and 'Clear' buttons. A red arrow points to a search result entry: 'Group Name EIN: xxxx'.

**Right Screenshot:** The 'My Connections' page is shown again, but with a different focus. It includes the same navigation bar. Below the navigation bar, there is a section titled 'My Connections' with a description: 'Connections will allow you to create surrogate relationships between Providers and individuals or organizations that work on the Providers' behalf.' Below this, there is a search bar labeled 'Search By: \*Employer Name' with 'Search' and 'Clear' buttons. A red arrow points to a search result entry: 'Group Name EIN: xxxx'.



# 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

| [Cancel](#)

# 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 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
<b>Provider</b>		XXXXXXXXXX	Harrisburg, PA 17110-9436

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"

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
<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, a navigation bar includes 'Home' (highlighted with a red box), 'My Profile', 'My Connections', and 'My Staff'. A 'Help' link is visible in the top right corner. The main content area is titled 'Home' and features a section for 'My Pending Connections'. This section explains that these are pending connection requests requiring approval or rejection. It shows 'Total Pending Providers: 0' and 'Total Pending Surrogates: 3'. Below this, a table lists pending requests with columns for 'Surrogate', 'Provider', 'PECOS', 'EHR', and 'NPPES'. The 'Surrogate' column includes a 'Group Name' field. At the bottom of the table, there are buttons for '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**

**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	<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**

The background is a dark blue gradient. On the right side, there are large, overlapping, semi-transparent blue geometric shapes, including a large 'C' and a large 'N'. On the bottom left, there is a pattern of small, light blue dots.

Initiate a Connection Request to a  
Group/Entity

# My Connection Tab – Individual Provider

The screenshot displays the CMS Identity & Access Management System interface. The left sidebar contains a 'Sign In' section with fields for 'User ID' and 'Password', a 'Sign In' button, and links for 'Forgot Password', 'Retrieve Forgotten User ID', and 'Enter your PIN'. Below this is a 'One account to access multiple systems' section with a 'Create Account Now' button. The main content area shows the 'My Connections' tab selected, displaying 'My Pending Connections' with counts for 'Total Pending Providers: 0' and 'Total Pending Surrogates: 0'. The right sidebar includes 'News & Alerts' with EUS contact information, 'Application Links' for NPPES, PECOS, and EHR Incentive Programs, and 'Quick Actions' with buttons for 'Add Connection', 'Add Staff', and 'Add Employer'.

**CMS Centers for Medicare & Medicaid Services**

**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:

**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, PECOS, and EHR incentive programs, manage staff, and authorize others to access your information. **Create Account Now**

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

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

**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.custhelp.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**

**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.

# 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

 **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


**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.

**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.





# 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:

XXXXXXXXXX

Search

First Name:

Last Name:

City:

State:

SE - Select One

ZIP:

Search Results

Name

NPI

Group Name

XXXXXXXXXX

View Other Name(s)

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

☐ PECOS

☐ EHR Incentive Program

☐ NPES

Continue

Cancel

# Submit and Review for a Group

Home My Profile My Connections My Staff

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

You have requests to continue.

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
- NPES

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** 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>	NPES	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 and highlighted with a red border. 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.' Below this, a yellow box contains a warning icon and the text 'Total Pending Providers: 0'. It explains that these are requests from individual providers or healthcare organizations. A section titled 'Pending Requests' contains a table with columns for 'Provider', 'Surrogate', 'PECOS', 'EHR', and 'NPPES'. The 'Provider' column has a sub-header 'Provider Name', and the 'Surrogate' column has a sub-header 'Group Name'. Below the table are three buttons: 'Select All', 'Approve All Selected', and 'Reject All Selected'. To the right of the main content area, there is a 'News & Alerts' section with 'EUS Contact Information' and a 'Quick Actions' section with 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

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

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

# 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:

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](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](#)

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](#)

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

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

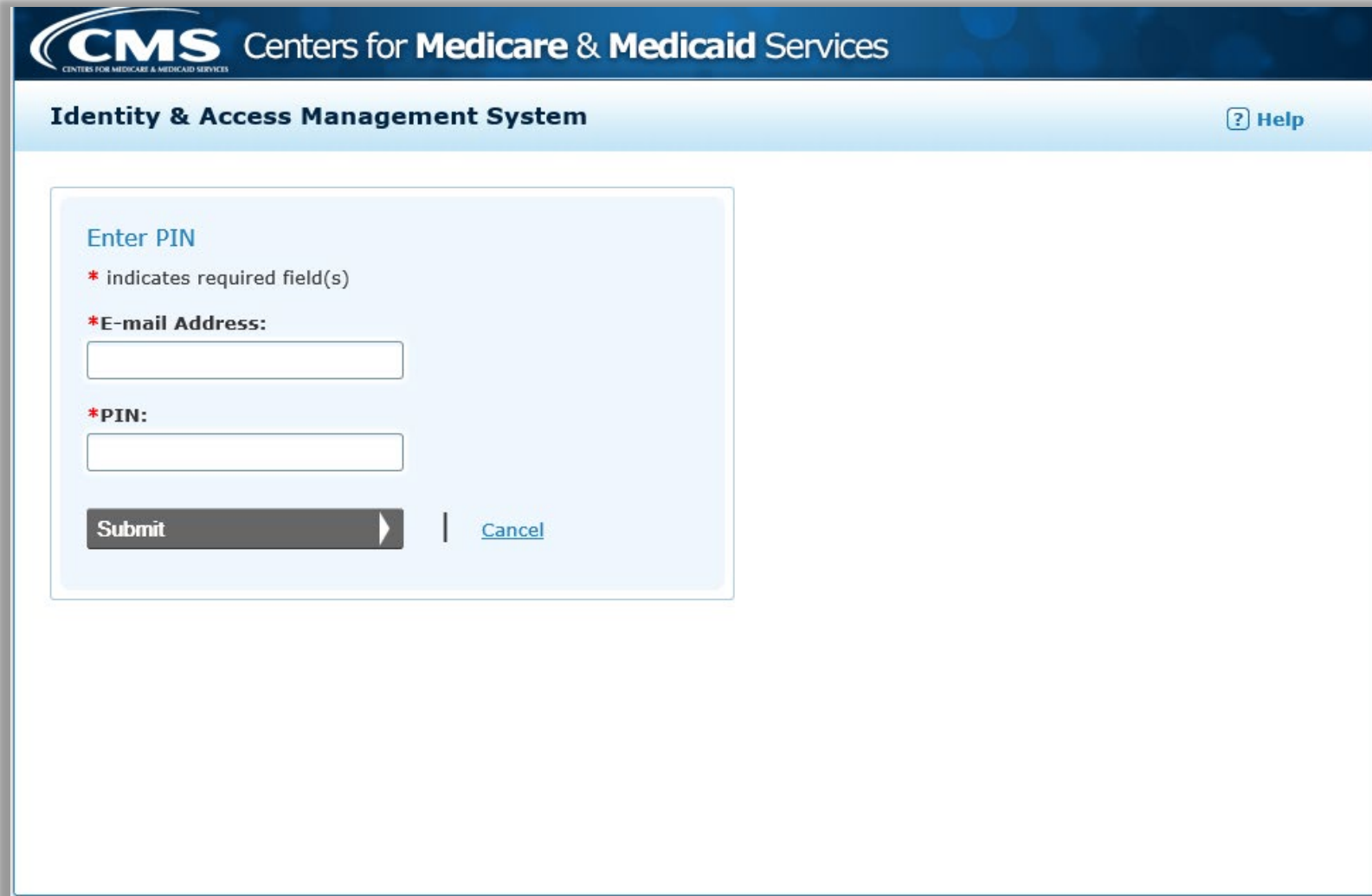
**NPPES** Use this system to apply for and manage National Provider Identifiers (NPIs).

**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 interface. At the top, the CMS logo and text 'Centers for Medicare & Medicaid Services' are displayed. Below this, the title 'Identity & Access Management System' is shown on the left, and a 'Help' link is on the right. The main content area is a light blue box titled 'Enter PIN'. Inside this box, there is a red asterisk followed by the text '\* indicates required field(s)'. Below this, there are two required fields: '\*E-mail Address:' and '\*PIN:'. Each field has a corresponding text input box. At the bottom of the box, there is a 'Submit' button with a right-pointing arrow, followed by a vertical line and a '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

-- Select One --

☐ 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

-- Select One --

-- Select One --

Staff End User

Access Manager

☐ PECOS

☐ EHR

☐ NPPES

# 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"/>

# Contact Information and Resources

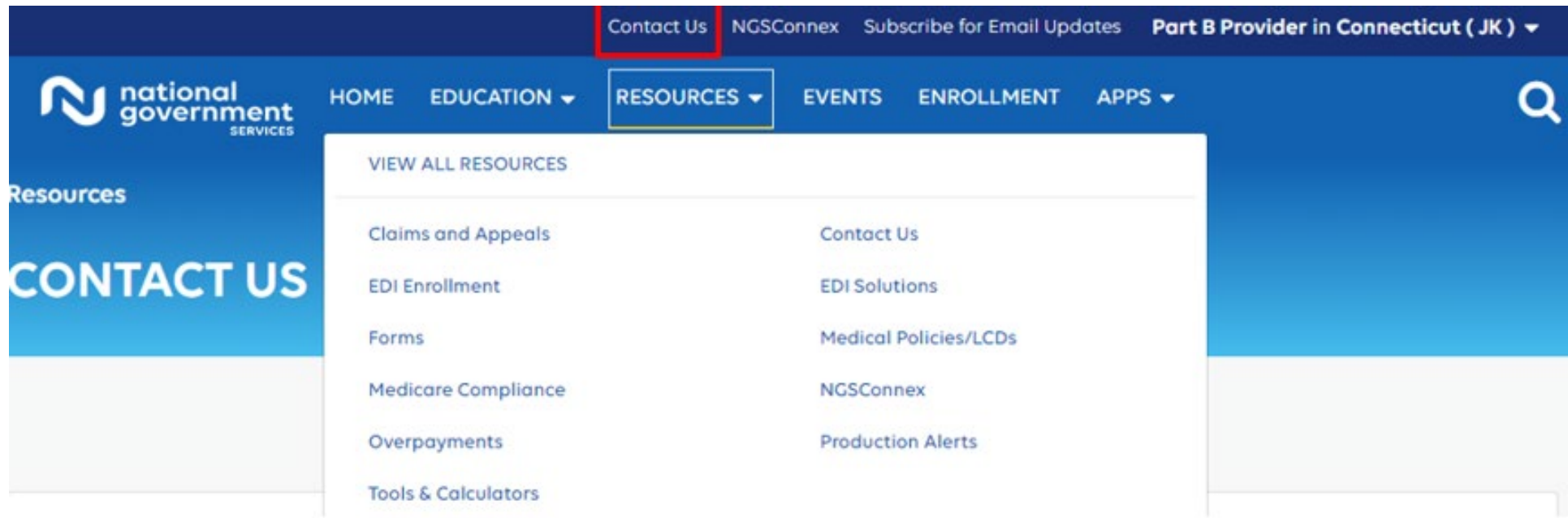




# Contact Information

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



## 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



medicare **mobile**

Text NEWS to 37702; Text GAMES to 37702



youtube.com/ngsmedicare

# Questions?

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