

# Provider Enrollment: Getting Access to PECOS

9/6/2022



# 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)

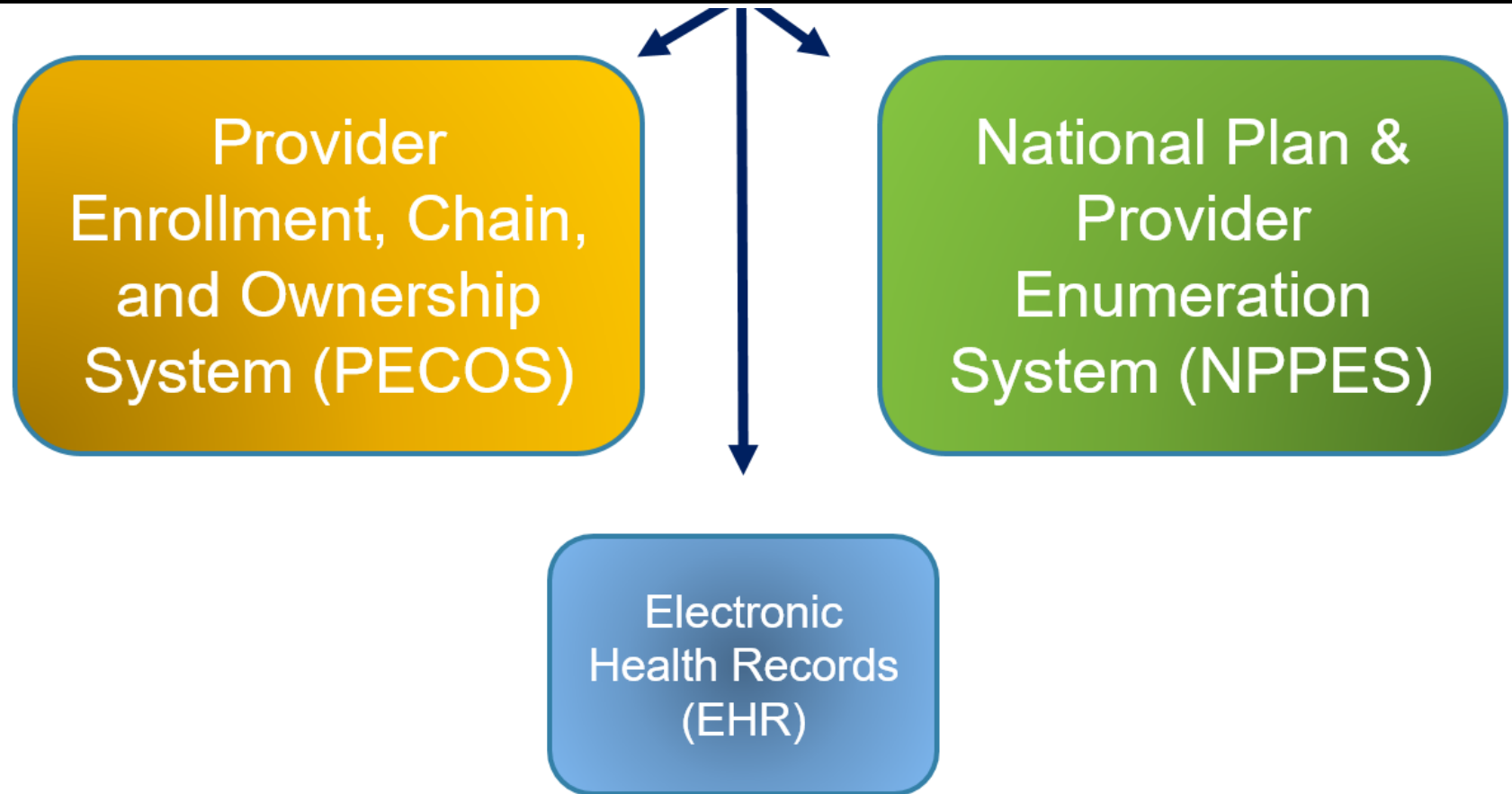


# Learn About PECOS

- 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



# 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 Established I&A User Account

# Retrieve Forgotten User ID

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- **Password:**

**Sign In**


- [Forgot Password](#)
- [Retrieve Forgotten User ID](#)
- [Enter your PIN](#)

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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



# Reset Password

The screenshot shows the CMS Identity & Access Management System interface. At the top, the CMS logo and 'Centers for Medicare & Medicaid Services' are displayed. Below this, the page title 'Identity & Access Management System' and a 'Help' link are visible. The main content area is titled 'Reset Password' and includes a 'Back to Previous Page' link. A note states '\* indicates required field(s)'. The form contains two input fields: 'New Password' and 'Confirm New Password'. To the right of these fields is a 'Password Compliance' section with a list of rules. A tooltip is visible over the 'Valid Special Characters' text, showing a list of characters: @ # & ) ( - \_ ' \* , + ; : / \$ !. At the bottom of the form, there are 'Reset' and 'Cancel' buttons.

**CMS** Centers for Medicare & Medicaid Services

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

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

\* indicates required field(s)

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

\* **New Password:**

\* **Confirm New Password:**

**Password Compliance:**

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

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

| [Cancel](#)

# Create New I&A User Account

# Create Account Now



**CMS** Centers for Medicare & Medicaid Services

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Help

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### 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).

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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

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

**Identity & Access Management System** Help



### User Registration

\* indicates required field(s)

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

\* **E-mail Address:**


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


 

[Listen to audio](#)

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

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

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

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

# User Security

**Identity & Access Management System** Help

### User Registration - User Security

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

\* indicates required field(s)

**User ID:**

**Password:**

**Confirm Password:**

**User ID Compliance:**

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

**Password Compliance:**

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

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

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

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

# User Information

**Identity & Access Management System** ? Help

**User Registration - User Information**

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

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

\* indicates required field(s)

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

|



# 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](#)

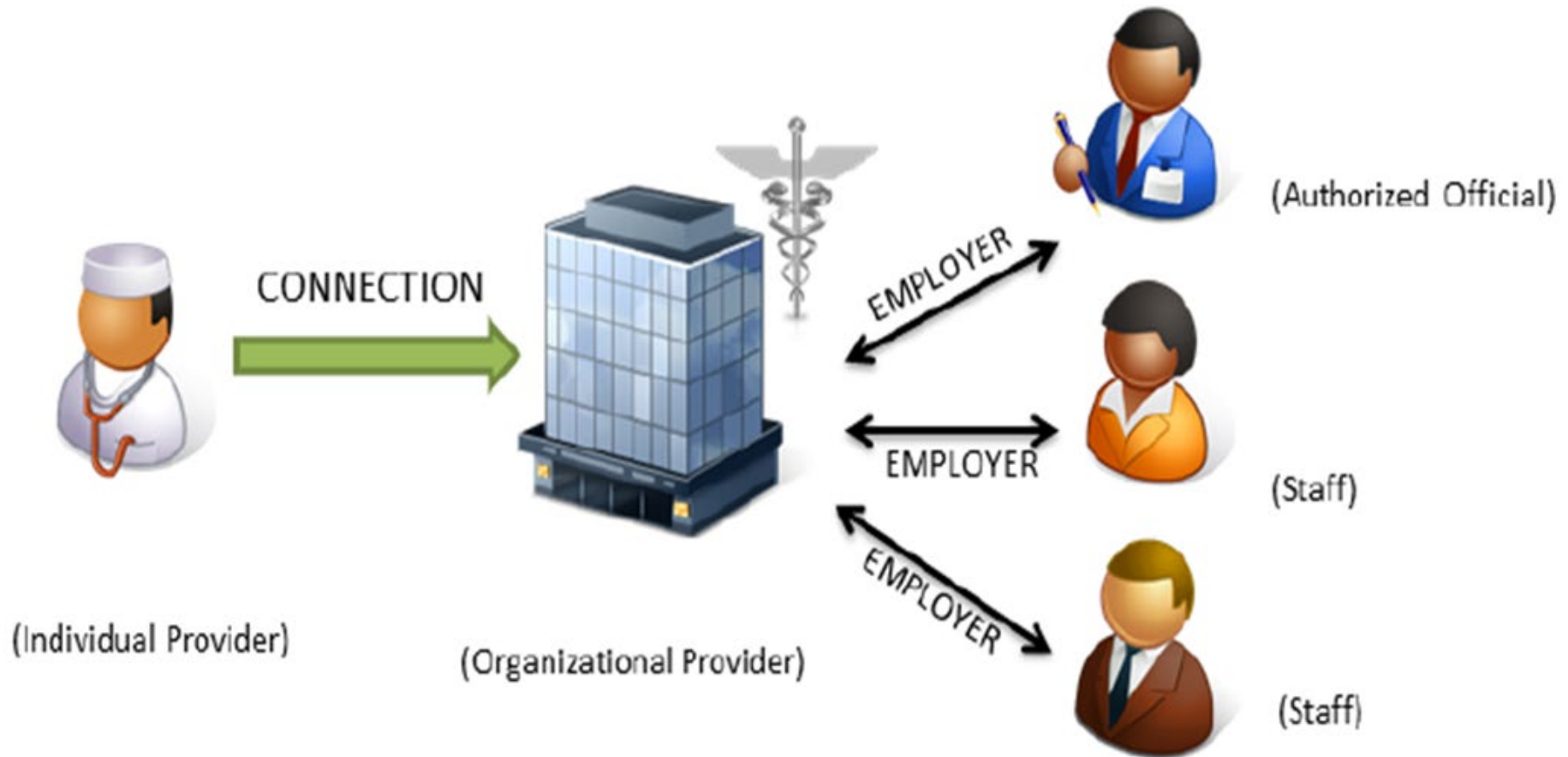
# My Profile Tab

## 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



# Add Employer

Identity & Access Management System Help

Home My Profile My Connections

### My Profile

My Information

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

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

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

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

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


### Employer Information

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

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

No Employers Exist.

| Employer ▼ | My Role with this Employer ▼ | My Status with this Employer ▼ | PECOS | EHR | NPPES |
|------------|------------------------------|--------------------------------|-------|-----|-------|
|------------|------------------------------|--------------------------------|-------|-----|-------|

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

# Search on an NPI

## Identity & Access Management System Help

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

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

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

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

# Search Results

## Identity & Access Management System Help

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

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

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

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

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

# Select Role

**Identity & Access Management System** Help

Home My Profile My Connections My Staff

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

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

Search Results

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


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

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

Please select the role you are requesting for this employer:

-- Select One --  
-- Select One --  
Authorized Official (signatory for your organization authorized to legally bind the organization in agreements)  
Access Manager (managing users, updating account information for your provider/organization)  
Staff End User (working in approved CMS applications for your provider/organization)

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





# 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:

# 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 [\[or approved alternate\]](#) issued by the IRS for the Organization for which you are requesting to be an Access Manager.
- OPTION B:**  
Please have an existing Authorized Official for this Organization approve your request by logging in to this system.

**Contact Information**

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

The employer you have registered for is:

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

**Document Management:**

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

More information about Uploaded Documents

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

| File Name                      | Document Type | Comments | Date Added | Actions |
|--------------------------------|---------------|----------|------------|---------|
| <a href="#">Add a Document</a> |               |          |            |         |

NPI(s) associated with your employer are:

| NPI                  | Legal Business Name | Location |
|----------------------|---------------------|----------|
| <a href="#">Done</a> |                     |          |

# 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<br><a href="#">Tracking Id</a><br>xxxxxxxx | 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

The image displays two screenshots of the CMS Identity & Access Management System. The left screenshot shows the 'Sign In' page with a 'My Connections' tab highlighted in red. The right screenshot shows the 'My Connections' page with a 'My Connections' tab highlighted in red. The 'My Connections' page displays 'Total Pending Providers: 0' and 'Total Pending Surrogates: 0'. The 'My Connections' tab is highlighted in red in both screenshots.

**Sign In**

- Indicates required field(s)
- User ID:
- Password:
- Sign In
- [Forgot Password](#)
- [Retrieve Forgotten User ID](#)
- [Enter your PIN](#)

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

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

**Identity & Access Management System**

Home My Profile **My Connections** My Staff

**Home**

**My Pending Connections**

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

Total Pending Providers: 0

Total Pending Surrogates: 0

**News & Alerts**

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

**Application Links**

- [NPPES](#)  
National Plan and Provider Enumeration System
- [PECOS](#)  
Medicare Provider Enrollment, Chain, and Ownership System
- [EHR Incentive Programs](#)  
Promoting Interoperability Programs Registration System

**Quick Actions**

- Add Connection
- Add Staff
- Add Employer

# Find Provider

Identity & Access Management System Help



Home My Profile **My Connections** My Staff

### My Connections

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

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

Search By: \*Employer Name  Search Clear

 **Group Name EIN: xxxx** 

Identity & Access Management System Help


Home My Profile **My Connections** My Staff

### My Connections


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

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

Search By: \*Employer Name  Search Clear

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

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

Find Provider 

Group Name has authorized the following surrogates:

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

Add Surrogate

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

# Search for a Provider

**Identity & Access Management System** ? Help

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

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

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

Organization Name:  NPI:

First Name:  Last Name:

City:  State: SE - Select One  ZIP:



**Search Results**

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

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

PECOS  EHR Incentive Program  NPPES

|





# Submit and Review for a Provider

**Identity & Access Management System** [Help]

Home My Profile My Connections My Staff

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

**Provider Name**

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

Name: **Provider Name**

Business Function(s) Selected:

- PECOS
- EHR Incentive Program
- NPPES

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

Additional E-mail Address:

NPI(s) Associated with this Provider:

| Provider Name        | Doing Business As | NPI        | Business Mailing Address  |
|----------------------|-------------------|------------|---------------------------|
| <b>Provider Name</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** is a surrogate for the following providers:

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

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

# Approval By Provider (Home Tab)

The screenshot displays the 'Identity & Access Management System' interface. At the top, there is a navigation bar with tabs for 'Home', 'My Profile', 'My Connections', and 'My Staff'. The 'Home' tab is selected and highlighted with a red box. Below the navigation bar, the main content area is titled 'Home' and contains several sections:

- My Pending Connections:** A section with a heading and a sub-heading. It contains a paragraph: "These are Pending Connection requests that have been sent to you or your organization and require your action to approve or reject." Below this is a yellow box stating "Total Pending Providers: 0".
- Total Pending Surrogates: 3:** A section with a warning icon and a heading. It contains a paragraph: "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." Below this is a sub-heading "Pending Requests" with a minus sign icon. It features a table with columns for "Surrogate", "Provider", "PECOS", "EHR", and "NPPES". The "Surrogate" column has a sub-column "Group Name". The "Provider" column has a sub-column "Provider Name". Below the table are three buttons: "Select All", "Approve All Selected", and "Reject All Selected".
- News & Alerts:** A section with a heading and a sub-heading. It contains a paragraph: "EUS Contact Information: External User Services (EUS) PO Box 792750 San Antonio, Texas 78279 <https://eus.custhelp.com>".
- Quick Actions:** A section with a heading and three buttons: "Add Connection", "Add Staff", and "Add Employer".

# My Connections Tab Individual Provider

# My Connection Tab – Provider

The screenshot displays the Identity & Access Management System interface. The top navigation bar includes the CMS logo and the text 'Identity & Access Management System'. Below this, a navigation menu contains 'Home', 'My Profile', 'My Connections' (highlighted with a red box), and 'My Staff'. The main content area is divided into two columns. The left column features a 'Sign In' section with fields for 'User ID' and 'Password', and a 'Create Account Now' button. The right column contains a 'My Pending Connections' section with two yellow boxes showing 'Total Pending Providers: 0' and 'Total Pending Surrogates: 0'. A right-hand sidebar includes 'News & Alerts', 'Application Links', and 'Quick Actions'.

**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).

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

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

**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**.

# Search for a Group

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

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

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

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

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

**Search Results**

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

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

PECOS  EHR Incentive Program  NPPES

|



# Submit and Review for a Group

Home My Profile My Connections My Staff

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

**You have requests to work on behalf of your provider. Review the information listed below before you 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
- NPPES

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

Additional E-mail Address:

Submit | Cancel



Identity & Access Management System [Help](#)

Home My Profile My Connections My Staff

My Connections

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

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

Search By: \*Employer Name

**Provider Name**

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

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

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

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

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

NPI: XXXXXXXXXX

# Approval by Authorized Official/ Access Manager (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 text block explains that these are pending connection requests requiring approval or rejection. A yellow warning box titled 'Total Pending Providers: 0' provides details about individual providers or healthcare organizations requesting approval. Below this, a table lists pending requests with columns for 'Provider', 'Surrogate', 'PECOS', 'EHR', and 'NPPES'. The 'Provider' column is further divided into 'Provider Name' and 'Group Name'. At the bottom of the table, there are three buttons: 'Select All', 'Approve All Selected', and 'Reject All Selected'. To the right of the main content area, there is a 'News & Alerts' section with 'EUS Contact Information' and a 'Quick Actions' section with buttons for 'Add Connection', 'Add Staff', and 'Add Employer'.

**Identity & Access Management System** Help

**Home** My Profile My Connections My Staff

### Home

#### My Pending Connections

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

**Total Pending Providers:** 0

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

Pending Requests

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

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

| Name ▼                 | Role                                  | PECOS | EHR Incentive Program | NPPES |
|------------------------|---------------------------------------|-------|-----------------------|-------|
| + <input type="text"/> | <input type="button" value="Modify"/> |       |                       |       |
| + <input type="text"/> | <input type="button" value="Modify"/> |       |                       |       |
| + <input type="text"/> | <input type="button" value="Modify"/> |       |                       |       |
| + <input type="text"/> | <input type="button" value="Modify"/> |       |                       |       |
| + <input type="text"/> | <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:**

| <input type="checkbox"/> Employer                              | Role  | <input type="checkbox"/> PECOS | <input type="checkbox"/> EHR | <input type="checkbox"/> NPPES |
|--|---|--------------------------------|------------------------------|--------------------------------|
| <input type="checkbox"/> <b>Group Name</b><br>EIN: xxx-xx-xxxx | <input type="text" value="-- Select One --"/><br>Staff End User<br>Access Manager | <input type="checkbox"/> PECOS | <input type="checkbox"/> EHR | <input type="checkbox"/> NPPES |
| <input type="checkbox"/> <b>Provider</b><br>NPI: xxxxxxxx      | <input type="text" value="-- Select One --"/>                                     | <input type="checkbox"/> PECOS | <input type="checkbox"/> EHR | <input type="checkbox"/> NPPES |

| [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

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**

[? Forget 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](#)

# 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 page 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 legend: '\* indicates required field(s)'. Below the legend, there are two required fields: '\*E-mail Address:' followed by an empty text input field, and '\*PIN:' followed by an empty text input field. At the bottom of the box, there is a dark grey 'Submit' button with a right-pointing arrow, and a blue 'Cancel' link to its right.

# 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<br>TTY: 800-692-2326<br>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<br>TTY: 866-523-4759<br>Email: <a href="mailto:EUSsupport@cgi.com">EUSsupport@cgi.com</a><br>Live Chat: <a href="https://eus.custhelp.com/">https://eus.custhelp.com/</a> |



# NGS Website



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?

