

Getting Access to PECOS

10/3/2023

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



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Today's Presenters

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 View Pending E-Signatures Application	TXXXXXX	MANAGE SIGNATURES CORRECT & RE-SUBMIT
Provider	XXXXXXXXXX	PENDING E-SIGNATURES View Pending E-Signatures Application	TXXXXXX	MANAGE SIGNATURES CORRECT & RE-SUBMIT

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	gtan	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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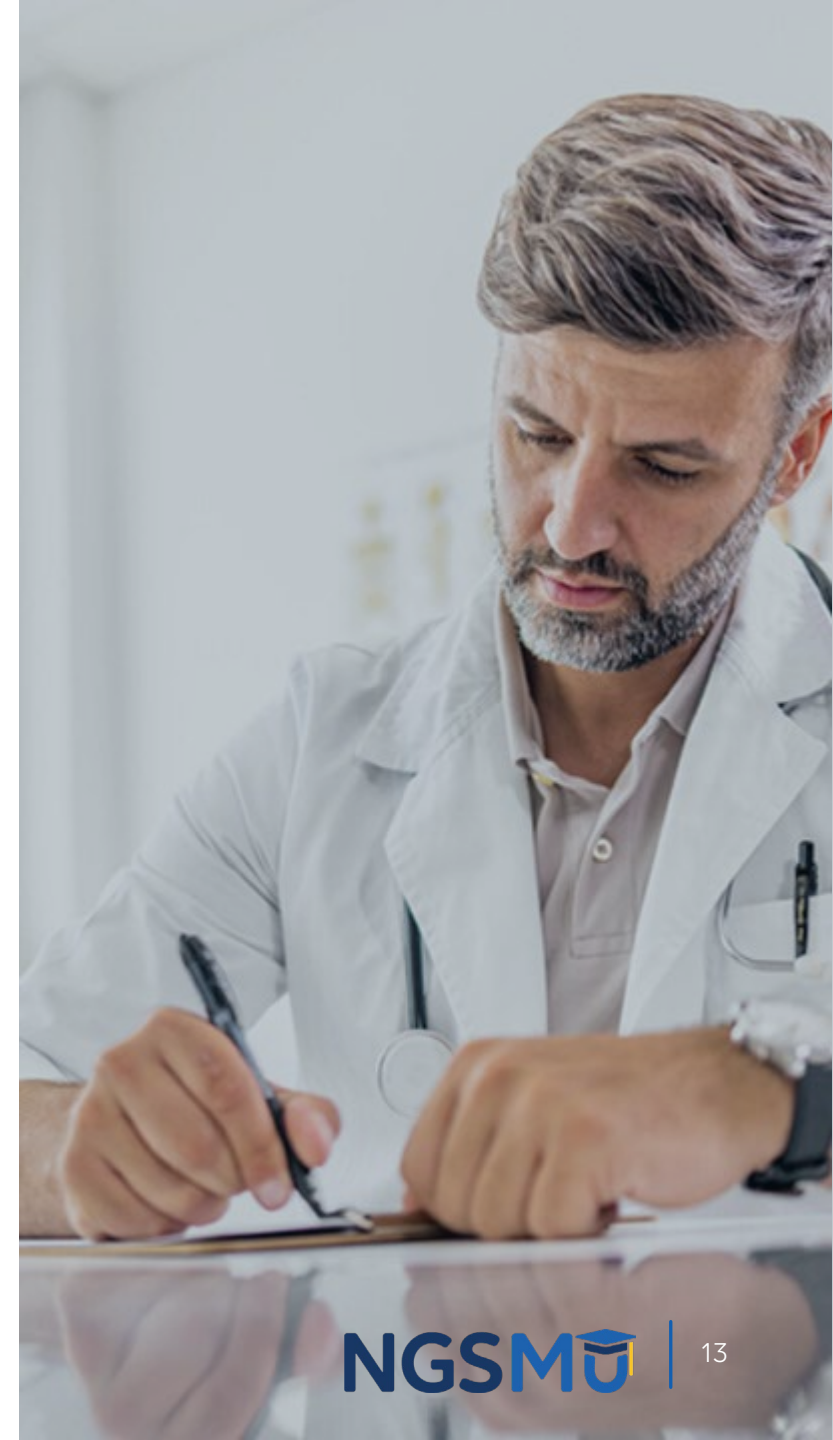
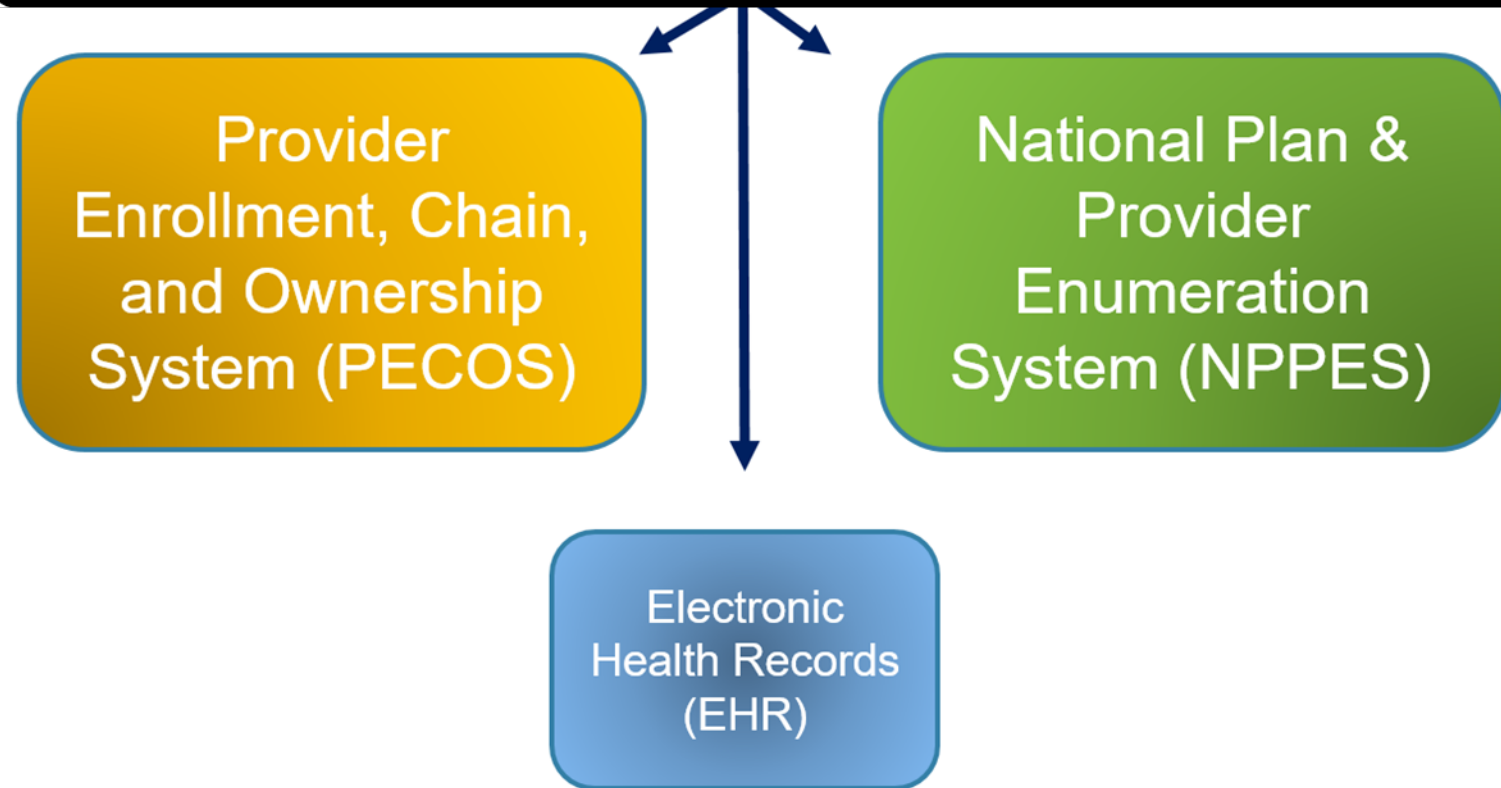
10

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

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

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.

Retrieve Forgotten User ID

Retrieve Forgotten User ID

Identity & Access Management System

Help

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Password:

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[Forgot Password](#)

[Retrieve Forgotten User ID](#)


[Enter your PIN](#)

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Retrieve Forgotten User ID - Information

CMS Centers for Medicare & Medicaid Services

Identity & Access Management System [Help](#)

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

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

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

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

* indicates required field(s)

E-mail Information OR **User Information**

*** E-mail Address:**

Continue

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

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

*** First Name:**

*** Last Name:**

*** Personal Phone Number:**

*** Home ZIP/ Postal Code:**

Continue

Retrieve Forgotten User ID - Confirmation


Retrieve Forgotten User ID - Confirmation



The User ID associated with this account is: 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. 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

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).




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Overview of features and tools to manage your account.



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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](#)


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)

<div><div><div>* First Name:</div><input type="text"/></div><div>Middle Name:</div><input type="text"/></div> <div><div>* Last Name:</div><input type="text"/></div> <div>Suffix:</div> <div><input type="text"/></div>

* Business Phone Number:

Fax Number:

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

* SSN:

Primary E-mail Address:
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

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 ▶

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. In the bottom-left corner, there is a pattern of small, light blue dots.

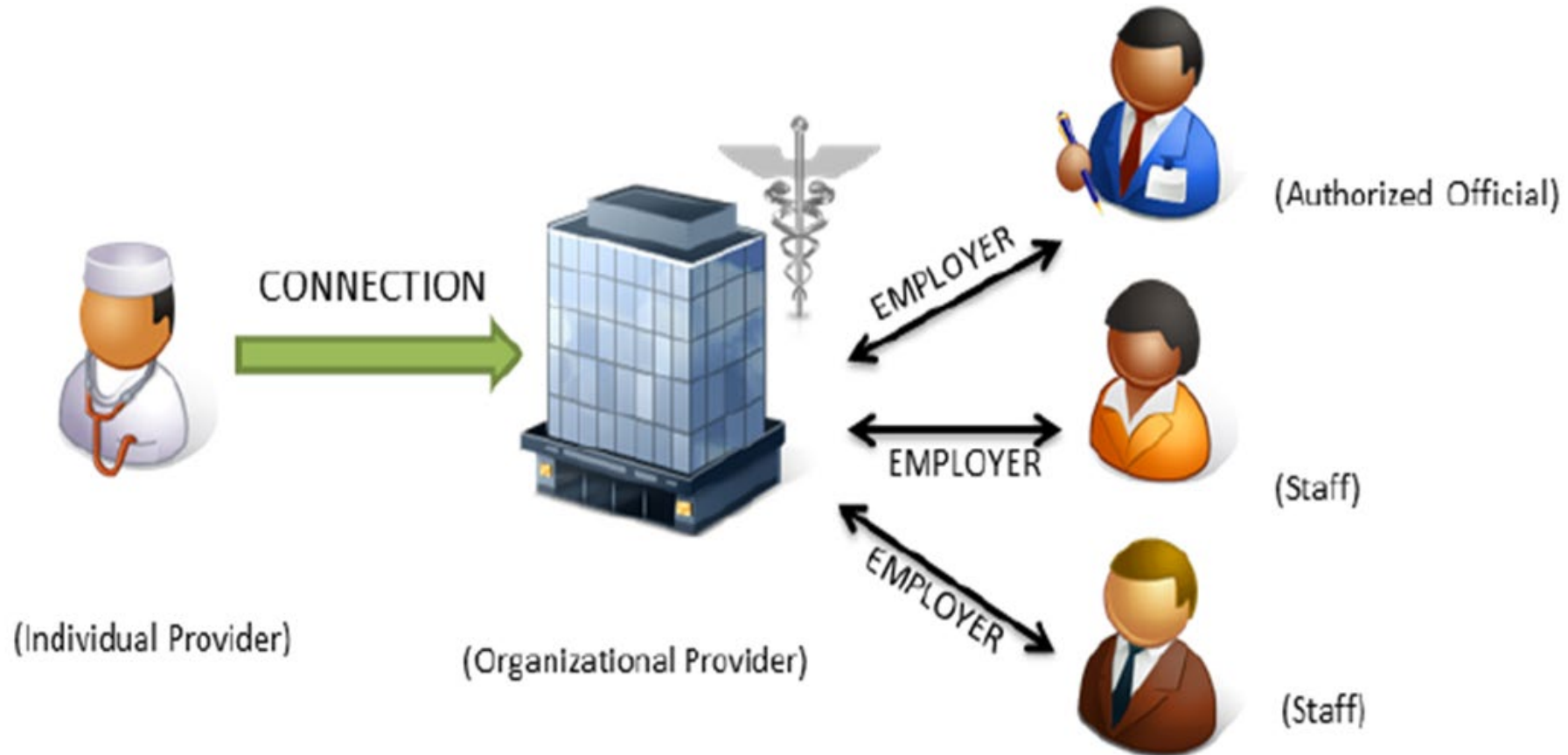
Register as an AO, AM or Staff End
User for Your Employer



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:

Search

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:

Search

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		XXXXXXXX	View NPI(s)	View Other Name(s)

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

Select Role

Identity & Access Management System [Help](#)

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

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

Search 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	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 --
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:

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 [\[or approved alternate\]](#) 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@cgl.com

The employer you have registered for is:

Legal Business Name	EIN	Mailing Address	Phone Number	Request Tracking ID
Group Name	XXXX-	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
<div>Add a Document</div>				

NPI(s) associated with your employer are:

NPI	Legal Business Name	Location
<div>Done</div>		

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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 Tracking Id xxxxxxxxxx	NO	NO	NO
+ Doe, John	Authorized Official	Approved	YES	YES	YES
+	Staff End User	Approved	NO	NO	YES

AO Role Request Approval

Home My Profile My Connections **My Staff**

My Staff - Active Staff

Role Requests Inactive Staff Add Staff

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

Identity & Access Management System [Help](#)

Home My Profile My Connections **My Staff**

My Staff - Pending Role Requests

Active Staff Inactive Staff Add Staff

Pending Role Requests

Search by: Employee Last Name Employee First Name
Employer Name

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

Initiate a Connection Request to a Provider

My Connection Tab

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](#)

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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 [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.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.

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. Both screenshots show a navigation bar with 'Home', 'My Profile', 'My Connections', and 'My Staff' tabs. The 'My Connections' tab is active in both.

Left Screenshot: The 'My Connections' section contains a description of connections and a search bar labeled 'Search By: *Employer Name'. Below the search bar, a result is displayed: 'Group Name EIN: xxxx'. A red arrow points to this result.

Right Screenshot: The 'My Connections' section contains a description of connections and a search bar labeled 'Search By: *Employer Name'. Below the search bar, a result is displayed: 'Group Name is a surrogate for the following providers:'. Below this result, a 'Find Provider' button is visible. A red arrow points to this button.

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
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

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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
Provider		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"

Search

Clear

Group Name

Group Name is a surrogate for the following providers:

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

Find Provider

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

Approve Connection Request By Provider

Home Tab

The screenshot displays the 'Identity & Access Management System' interface. At the top, there is a navigation bar with tabs: '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'. Below this, a message states: 'These are Pending Connection requests that have been sent to you or your organization and require your action to approve or reject.'

A yellow box indicates 'Total Pending Providers: 0'.

Below this, another yellow box shows 'Total Pending Surrogates: 3'. A message explains: '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.'

A 'Pending Requests' section is visible, containing a table with columns: 'Surrogate', 'Provider', 'PECOS', 'EHR', and 'NPES'. The 'Surrogate' column has a sub-column 'Group Name'. The 'Provider' column has a sub-column 'Provider Name'. The table currently shows no data rows.

At the bottom of the table, there are three buttons: 'Select All', 'Approve All Selected', and 'Reject All Selected'.

On the right side of the interface, 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'.

The background is a solid dark blue. On the right side, there are large, overlapping, semi-transparent blue geometric shapes, including a large 'C' and a large 'R'. In the bottom-left corner, 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, 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**

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

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: [Search](#)

First Name: Last Name:

City: State: ☐ ZIP:

Search Results

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

[View Other Name\(s\)](#)

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

☐ PECOS ☐ EHR Incentive Program ☐ NPPES

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

Submit and Review for a Group

HomeMy ProfileMy ConnectionsMy Staff

My Connection ▶ Add SurrogateBack to Previous Page

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

Your Provider Information

Name: Provider Name

Doing Business As (DBA):

NPI: XXXXXXXXXX

Surrogate Information

Name: Group name

Business Mailing Address: Harrisburg, PA 17110-9436

Business Function(s) Selected:

- PECOS
- EHR Incentive Program
- NPPES

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

Additional E-mail Address:

SubmitCancel

Identity & Access Management SystemHelp

HomeMy ProfileMy ConnectionsMy 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 NameSearchClear

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.

Find Provider

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.

Add Surrogate

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

NPI: XXXXXXXXXX

Approval Connection Request by AO/AM

Home Tab

The screenshot displays the 'Identity & Access Management System' interface. At the top, there is a navigation bar with tabs for 'Home', 'My Profile', 'My Connections', and 'My Staff'. The 'Home' tab is selected. Below the navigation bar, the main content area is titled 'Home' and 'My Pending Connections'. A message states: 'These are Pending Connection requests that have been sent to you or your organization and require your action to approve or reject.' A yellow box highlights the 'Total Pending Providers' section, which includes a description: '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.' Below this, there is a 'Pending Requests' section with a table. The table has 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

Manage Your Employees and Their Access

Add/Modify Staff, Approve Role Requests

My Staff Tab

Identity & Access Management System

Help

Home

My Profile

My Connections

My Staff

My Staff - Active Staff

Role Requests

Inactive Staff

Add Staff

Active Staff

Search by:

Employee Last Name

Employee First Name

Employer Name

Search

Clear

Name	Role	PECOS	EHR Incentive Program	NPPES
<div>+</div>	Modify			
<div>+</div>	Modify			
<div>+</div>	Modify			
<div>+</div>	Modify			
<div>+</div>	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

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

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

PIN Entry Page: https://nppes.cms.cmstest/IAWeb/register/register_pin.do 

PIN: 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

[? 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 NPES, 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.

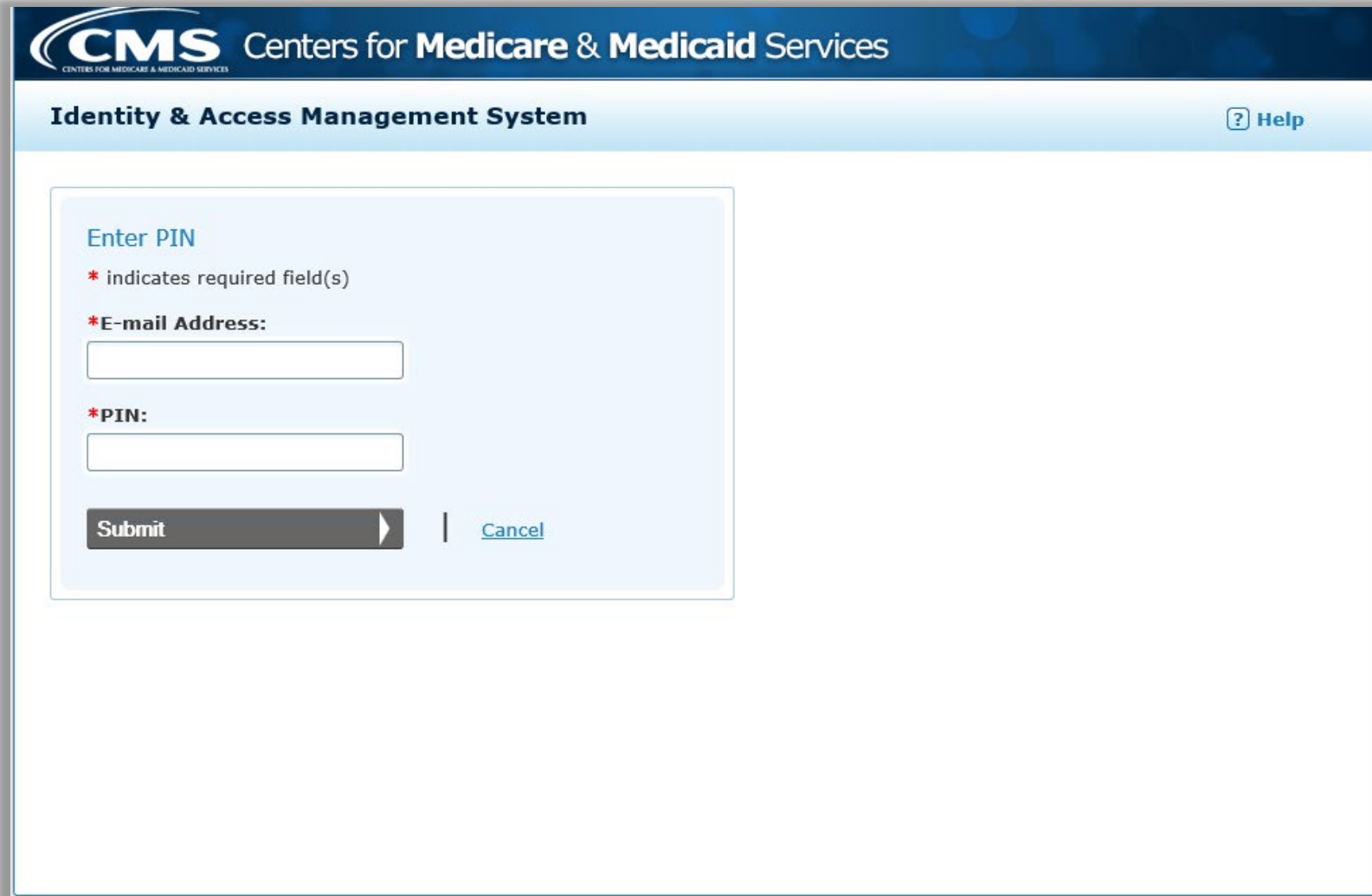
NPPES Use this system to apply for and manage National Provider Identifiers (NPIs).

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](#)

Enter Email and PIN



The screenshot shows the login interface for the CMS Identity & Access Management System. The header includes the CMS logo and the text 'Centers for Medicare & Medicaid Services'. Below the header, the title 'Identity & Access Management System' is displayed 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 stating '* indicates required field(s)'. Below the legend, there are two required fields: '*E-mail Address:' followed by a text input field, and '*PIN:' followed by a text input field. 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






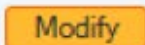
* indicates required field(s)

*E-mail Address:

*PIN:

Submit | [Cancel](#)

Modify Role

Name ▼	Role	PECOS	EHR Incentive Program	NPPES
 Jones, Samuel				
 nppes, Kavitha				
 Shelton, Blake				

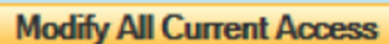
Eleven-six, MFA




Role 

☐ PECOS ☐ EHR ☐ NPPES

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



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
		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"/>

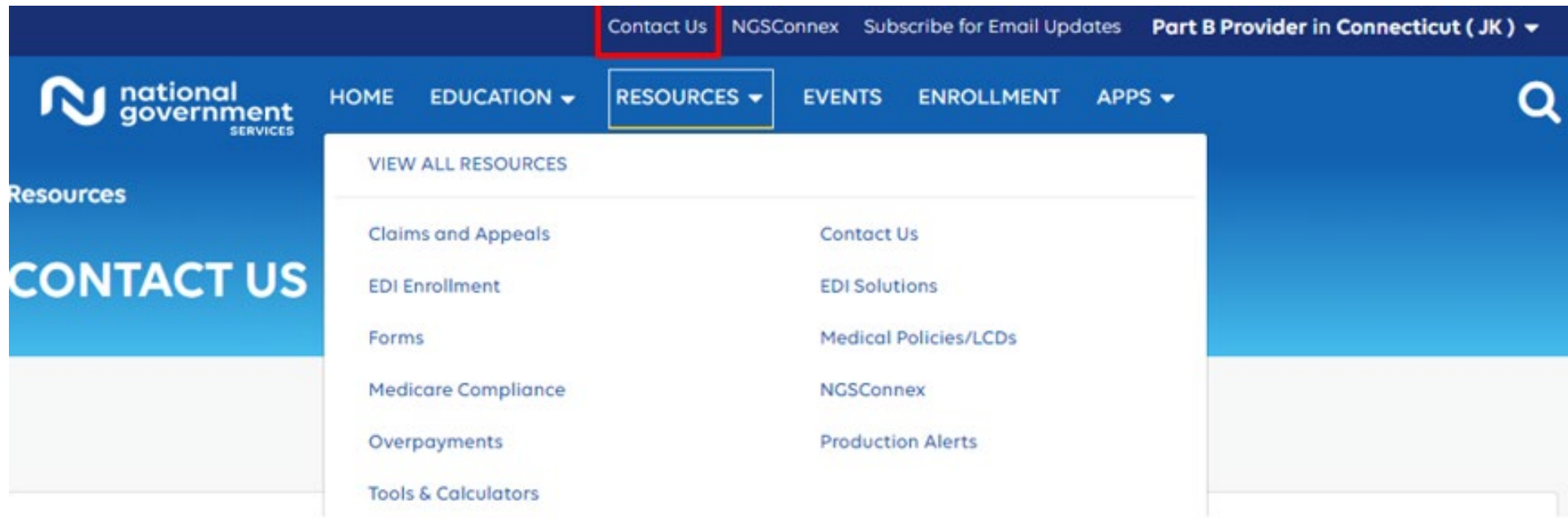
Contact Information and Resources



Contact Information

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

NGS Website



Mailing Addresses

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

Provider Enrollment

Resources

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

Summary

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

Connect with us
on Social Media



[YouTube Channel](#)
Educational Videos

medicare **mobile**

Text NEWS to 37702; Text GAMES to 37702

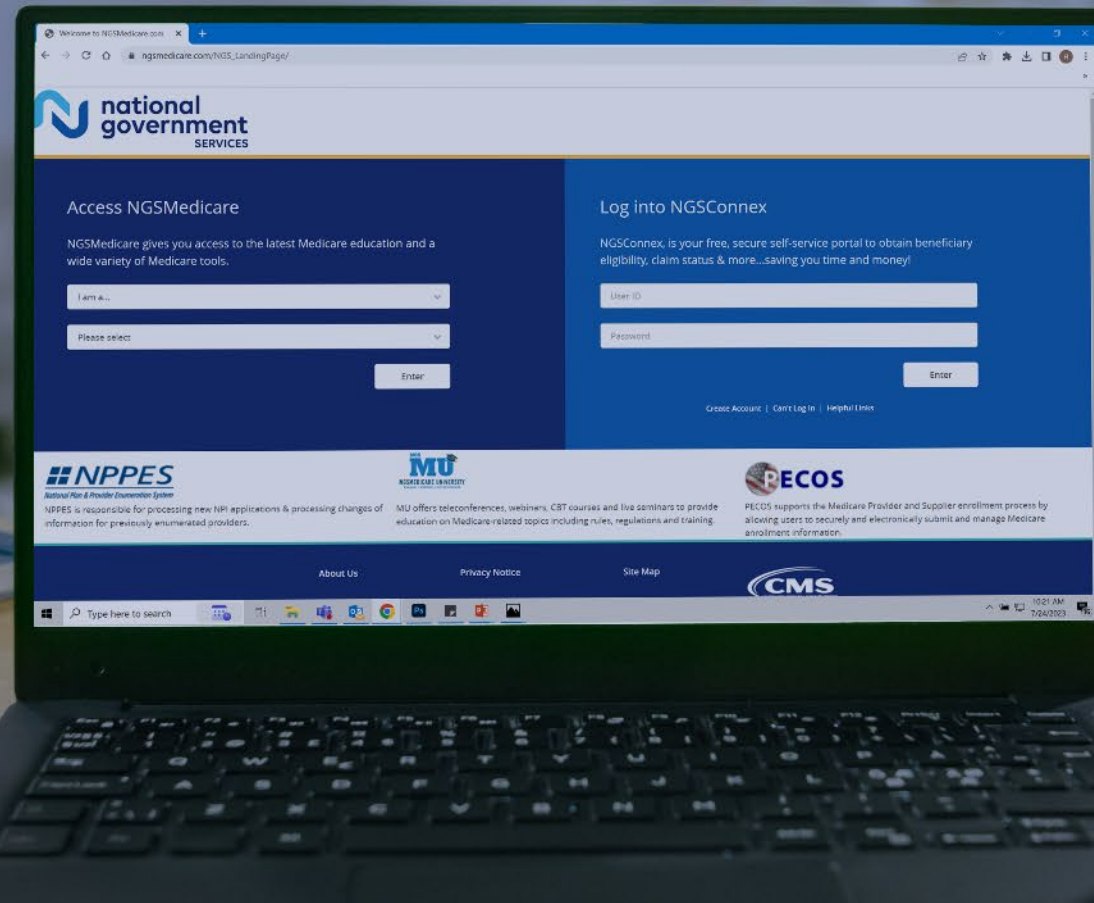


www.MedicareUniversity.com
Self-paced online learning



[LinkedIn](#)
Educational Content

Find us online



www.NGS Medicare.com

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



IVR System

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



[NGSConnex](#)

Web portal for claim information



[Sign up for Email Updates](#)

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

Questions?

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