





Provider Enrollment – Getting Access to PECOS 11/4/2021





Today's Presenters

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 - Provider Outreach and Education
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 - 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)





Benefits of PECOS

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





CMS Systems and Relationship





Identity & Access (I&A) Management System

Provider Enrollment, Chain, and Ownership System (PECOS)

National Plan & Provider Enumeration System (NPPES)

Electronic Health Records (EHR)





Identity & Access Management System







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I&A Management System

- Purpose for I&A security system
 - Individual profile for user ID to access multiple systems
 - <u>PECOS</u> (Medicare provider enrollment information)
 - <u>NPPES</u> (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







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



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





Identity & Access Management Sy	stem	(7) H
Retrieve Forgotten User ID - Informa	tion	
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A Note: You have two options for retrieving yo	ur User ID.	
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If you choose to receive your User ID by e-m enter the User Information associated with y	ail and do not re our account.	ceive the e-mail within 24 hours, please return to this page ar
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Continue		* Date of Birth: Ex: (MM/DD/YYYY)
		* First Name:
		* Last Name:
		* Personal Phone Number:
		* Home ZIP/ Postal Code:

















Create New I&A User Account

















Registration - User Security			
Step 1 User Security Step 2 User Info	tep 3 FA Setup	w	
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* Last Name:	Home Address Line 2:	
Suffix:	• city:	
* Business Phone Number:	* Country:	
	United States	
Fax Number:	* State/ Province/ Territory:	
	SE - Select One	
• Date of Birth: (MM/DD/YYYY)	Postal/ZIP Code:	
* SSN:		
Primary E-mail Address:		

















My Profile Tab Add An Employer





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







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Date of Birth:				
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Authorized Official or Access Manager

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Use My Primary E-mail Address		ployer E-mail Address:	
Please select the role you are requ	esting for this e	mployer:	
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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 § 424.520(b)>.

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





Important Note: Once approved, A Business Functions for their employe granted access to Business Function	ar and a s by an	zed Officials and Access Managers will a any provider they have been granted a Authorized Official or Access Manager	automatically have access to all ccess to. Staff End Users must of the employer.
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Use My Primary E-mail Address	OR	Enter Employer E-mail Address:	Confirm E-mail Address:
Please select the role you are requ	esting	for this employer:	
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My Connections Tab Authorized Official/Access Manager











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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.



Group Name has authorized the following surrogates:

The following Individual(s) or Organization(s) have been authorized to work on behalf of (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





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medicare university 40

dentity & Access Management System 2 Hel	
Home Ny Profile Ny Connections Ny Staff	Identity & Access Management System
My Connection > Add Provider	Home My Profile My Connections My Staff
Provider A You have requested to work on behalf of NameW as a surrogate. Once the connection has been approved, you will automatically be connected to all associated NPT's. Review the information listed below before you continue.	My Connections
Name: Provider Name Business Function(s) Selected: • PECOS • EHR Incentive Program • NPPES	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 Closer Closer
To send this connection request notification to a another e-mail address in addition to what is currently on life for this provider, enter the additional e-mail address below. Additional E-mail Address: Provider E-mail address	Group Name
NPI(s) Associated with this Provider:	Group Name (IS a Surrogate for the following providers: Group Name r has been authorized to work on behalf of the Individual Provider(s) or Healthcare Organization(s) listed perow, use the Find Provider button below to initiate a request to work on behalf of a Provider or Organization not listed
Provider Name Doing Business As NPI Business Mailing Address Provider Name XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	here. Find Provider
Submit Cancel	Name NPI Tracking ID Business Function Access Status





Approval by Provider (Home Tab)

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.	News & Alerts () EUS Contact Information: External User Services (EUS) PO Box 792750 San Antonio, Texas 78279
Total Pending Surrogates: 3 Below are Individuals or Organizations who are asking you to authorize them as a Surrogate for you (or your organization). Approving these requests will allow them to access and update your information in the CMS systems you specify. Pending Requests	Quick Actions Add Connection Add Staff Add Employer
Surrogate Provider PECOS EHR NPPES Group Name Provider Name □ □ □ Select All Approve All Selected Reject All Selected	





My Connections Tab Individual Provider





CMS Centers for Medicare & Medicaid Services CMS Centers for Medicare & Medicaid Services Logged in as Site Site Last Logged on 08/05/2019 07:19AM Sign Out **Identity & Access Management System** 2 Hel **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 One account to access multiple systems indicates required field(s) Create one account with the Identity & Access Management Home **My Profile My Connections** My Staff System to manage access to NPPES, PECOS, and EHR incentive • User ID: programs, manage staff, and authorize others to access your information. Create Account Now Password: Home News & Alerts Use this system to register for ECOS Sign In Medicare or update your My Pending Connections () EUS Contact Information: current enrollment information. External User Services P Forgot Password Register to receive EHR. (EUS) These are Pending Connection requests that have been sent to you or your organization incentive payments for eligible Retrieve Forgotten User ID professionals and hospitals that PO Box 792750 and require your action to approve or reject. (?) Enter your PIN adopt, implement and upgrade San Antonio, Texas 78279 or demonstrate meaningful use https://eus.custhelp.com with certified EHR technology. **Total Pending Providers:** 0 **II** NPPE Use this system to apply for and manage National Provider Natural Plan & Provider Enumerator Syste **Ouick Actions** Identifiers (NPIs). **Total Pending Surrogates: 0** Add Connection **Quick Reference Guide Frequently Asked Questions** 100 Overview of features and tools Answers to common questions about registration, who Add Staff to manage your account. should register, and how to manage your account.





Add Employer

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Identity 8	Access Man	agement Syster	n		2 Help	
Home	My Profile	My Connections	My Staff			
My Connections Providers' b	ections will allow you to shalf.	onate surrogate relatio	inships between Providers ar	d individuals or organizations that wo	rk on the	
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	Provider	Name	-			Provider 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
					Pro	vider Name: has authorized the following surrogates:
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My Connection ► Add Surrogate ▲ You have requested E Group Name to work on behalf of your provider. Review the information listed below before you continue.	My Connections Connections will allow you to create surrogate relationships between Providers and in Providers' behalf. Select the name of a Connection to update or view more information about that conn Search By: "Employer Name	dividuals or organizations that work on the ection.
Your Provider Information	Provider Name Provider Name Source for the following providers: Provider Normal	
Name: Provider Name Doing Business As (DBA): NPI X000000000	has been authorized to work on behalf of the Individual Provide below. Use the Find Provider button below to initiate a request to work on beha here.	er(s) or Healthcare Organization(s) listed If of a Provider or Organization not liste
Surrogate Information	Find Provider	
Name: Group Name		
Business Function(s) Selected: • PECOS • EHR Incentive Program • NPPES	Provider Namehas authorized the following surrogates: The following Individual(s) or Organization(s) have been authorized to work on Surrogate button to initiate the process of authorizing an Individual or Organization	behalf of Provider Use the Add stion to work on behalf of Provider
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:	Add Surrogate	Name
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Submit) Cancel	Group Name	





(Home Tab) Approval by Authorized Official/ Access Manager

Home	My Profile	My Connections	My Staff		
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These you (o allow y	are Individual Pro r your organization you and your staf	oviders or Healthcare O on) to work on their beh f to work on their behal	rganizations wh half. Approving if.	o have requested these requests will	Quick Actions
- Pen	ding Requests			company and	Add Connection
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My Staff Tab Manage Access











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* indicates	s required field(s)						
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Then, s	elect the Employe	er(s) the staff u	ser is to be	oranted access	to and the select i	Role the stat	ff user should have for
that en	nployer.						
Please	be aware the PIN	generated for t	his invitation	n will expire in	72 hours.		
• First Na	ime:						
Middle Na	amei	_					
+ Last Na	mei						
• Last Na	mei						
* Last Na	me: Address:						
* Last Na	nme: Address:						
* Last Na * E-mail /	nne: Address: n E-mail Addres:	51					
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* Last Na * E-mail /	me: Address: n E-mail Addres:	51					
Last Na E-mail Confirm Emple	ne: Address: h E-mail Addres: oyer	SI Role Staff	Hect One –			EHR	
* Last Na * E-mail / Confirm Emple Pro	Address: Address: a E-mail Addres: oyer vider Name	si Role Staff Acce	lect One – Find User #ss Manager		PECOS	EHR	NPPES
Last Na E-mail / Confirm Dro Pro	Address: Address: E-mail Addres: over vider Name	si Role Staff Acce	ect One — End User Ess Manager		PECOS	EHR	NPPES





Approval by Staff

From: donotreply@cms.gov To: @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: XXXXXXXXXXXXX Invitation Tracking ID: 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



CMS Centers for Medicare & Medicaid Services

Identity & Access Management System

7 Help

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

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 tha adopt, implement and upgrade or demonstrate meaningful use with certified EHR technology.
Nytonal Pipe & Provider Enumerator System Use this system to apply for and manage National Provider Identifiers (NPIs).











Contact Information and Resources





Contact Information and Resources

	For Assistance With	Contact	Contact Information
•	Changing an NPPES password Establishing a new user ID and password for NPPES Questions related to the NPI application	NPI Enumerator	Phone: 800-465-3203 TTY: 800-692-2326 Email: <u>customerservice@npienu</u> <u>merator.com</u>
•	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: <u>EUSSupport@cgi.com</u> Live Chat: <u>https://eus.custhelp.com/</u>





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но	OME		RESOURCES -	EVENTS	ENROLLMENT	APPS 🔫
	VIEW	ALL RESOURCES				
	Claim	is and Appeals		Contact Us		
	Cost	Reports		EDI Enrollm	ent	
	EDI S	olutions		Fee Schedul	es and Pricers	
	Form	s		Medical Poli	cies	
	Medi	care Compliance		NGSConnex		
	Over	payments		Production	Alerts	
1	Tools	& Calculators				

Provider Enrollment





Contact Information and Resources

- Quick reference guides and FAQs for creating and managing accounts
 - Identity & Access System Quick Reference Guide
 - <u>CMS Identity & Access Management System</u>





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?





