



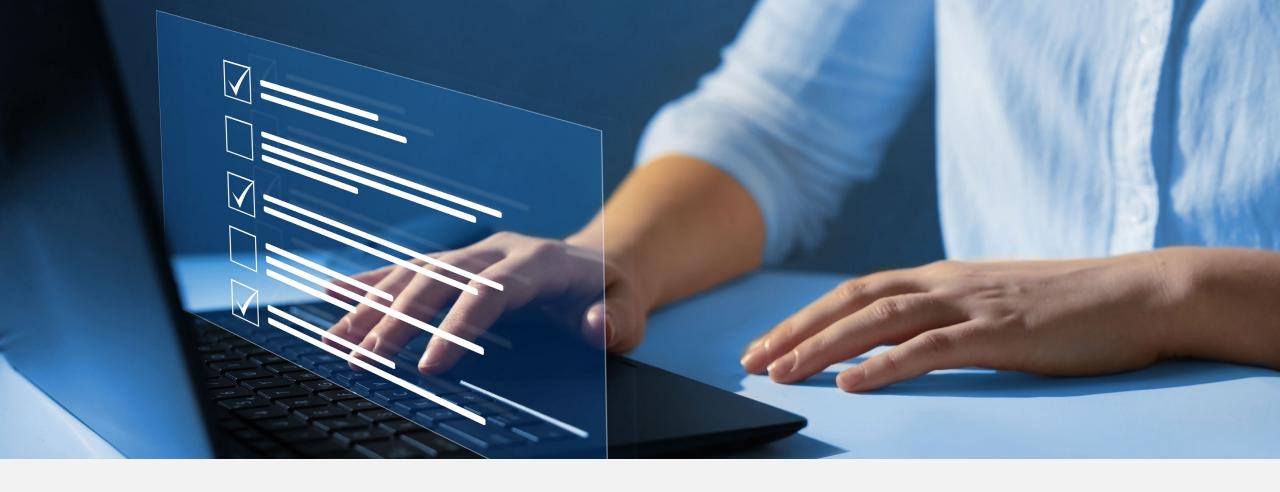
# PECOS: Manage Signatures and Additional Information Requests

6/20/2024

**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.





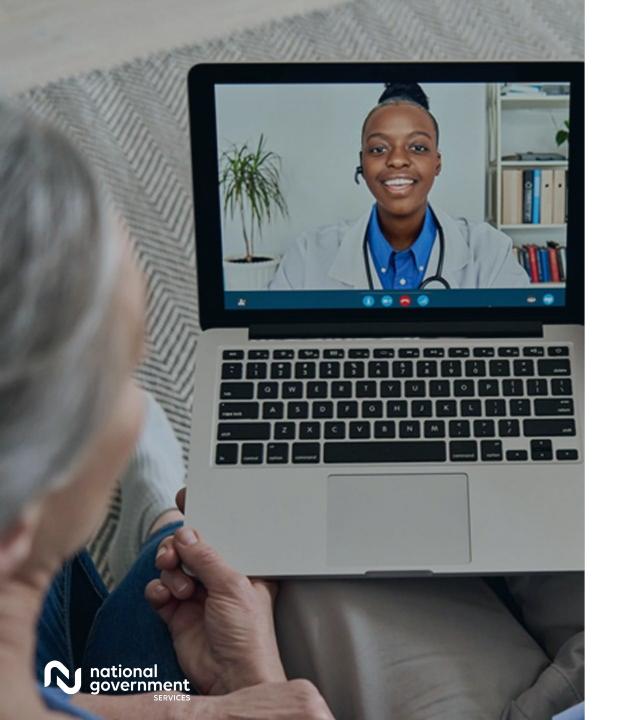


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#### Today's Presenters

Provider Outreach and Education Consultants

- Laura Brown CPC
- Susan Stafford PMP, COA, AMR











#### Agenda

- Verify and Manage Signature(s) After Submission
  - Print Certification Statements
  - Upload Certification Statements
  - E-signature Certification
- PECOS Application Status
- Request for Additional Information
  - Returned for Corrections
  - Verify and Manage Signatures after Corrections
- Resources







# Verify and Managing Signature(s) After Submission

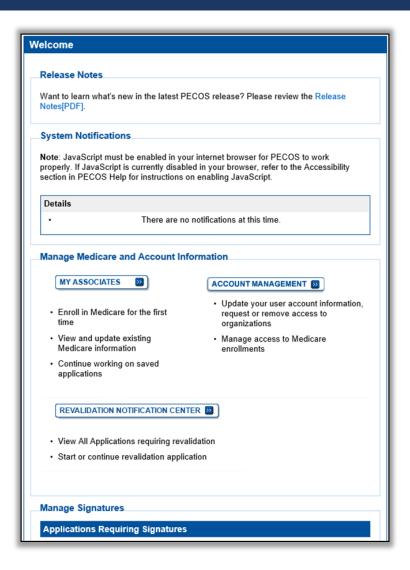
## Log Into PECOS

| elcome to the Medicare Provider Enrollment, Chain, a  | nd Ownership System (PECOS)   |
|---|---|
|   | (*) Red asterisk indicates a required field.  |
| PECOS supports the Medicare Provider and Supplier enro<br>electronically submit and manage Medicare enrollment info | allment process by allowing registered users to securely and primation.   |
| New to PECOS? View our videos at the bottom of this pag   | je.   |
| SYSTEM NOTIFICATIONS  |   |
| for any applications submitted on or after March 1  | n 1135 of the Social Security Act to waive the application fee<br>, 2020 in response to COVID-19. Please do not submit an<br>ormation on provider enrollment flexibilities related to   |
| USER LOGIN  | BECOME A REGISTERED USER  |
| Please use your I&A (Identity & Access Management System) user ID and password to log in.  * User ID                | You may register for a user account if you are: an Individual<br>Practitioner, Authorized or Delegated Official for a Provider or<br>Supplier Organization, or an individual who works on behalf<br>of Providers or Suppliers.                                      |
|   | Register for a user account   |
| * Password  | Questions? Learn more about registering for an account  |
| LOG IN D  | Note: If you are a Medical Provider or Supplier, you must register for an NPI 📇 before enrolling with Medicare.   |
|   | Helpful Links   |
| Forgot Password?  | Application Status 🗗 - Self Service Kiosk to view the status of an application submitted within the last 90 days.   |
| Manage/Update User Profile  | Important Note: CMS is using its authority under Section<br>1135 of the Social Security Act to waive the application fee  |
| Who Should I Call? [PDF, 155KB]  - CMS Provider Enrollment Assistance Guide   | for any applications submitted on or after March 1, 2020 in response to COVID-19. Please do not submit an application fee with your application. For more information on provider enrollment flexibilities related to COVID-19, please visit the CMS website [PDF]. |
|   | Pay Application Fee 🗗 - Pay your application fee online.  |
|   | View the list of Providers and Suppliers [PDF, 94KB]  |





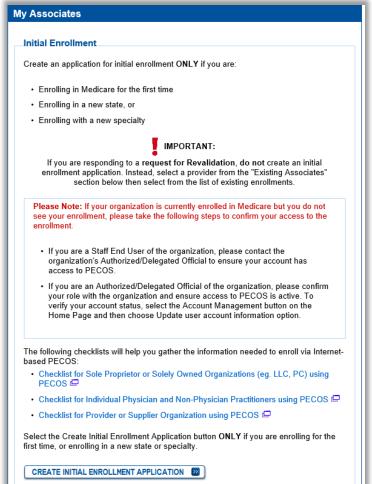
#### Select My Associates

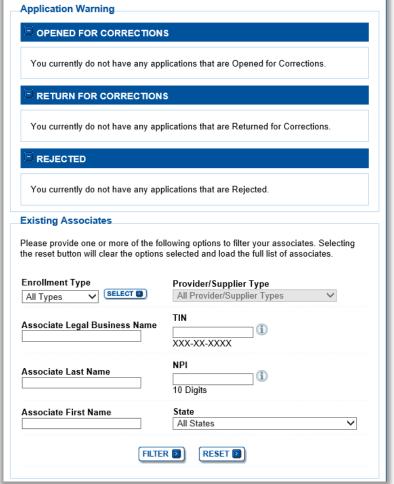






#### My Associates Filter



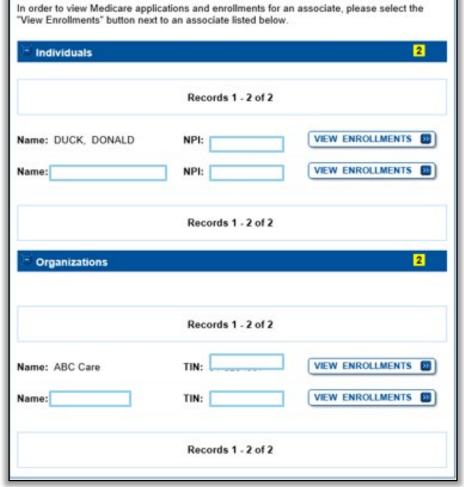






#### My Associates

Select "View Enrollments"







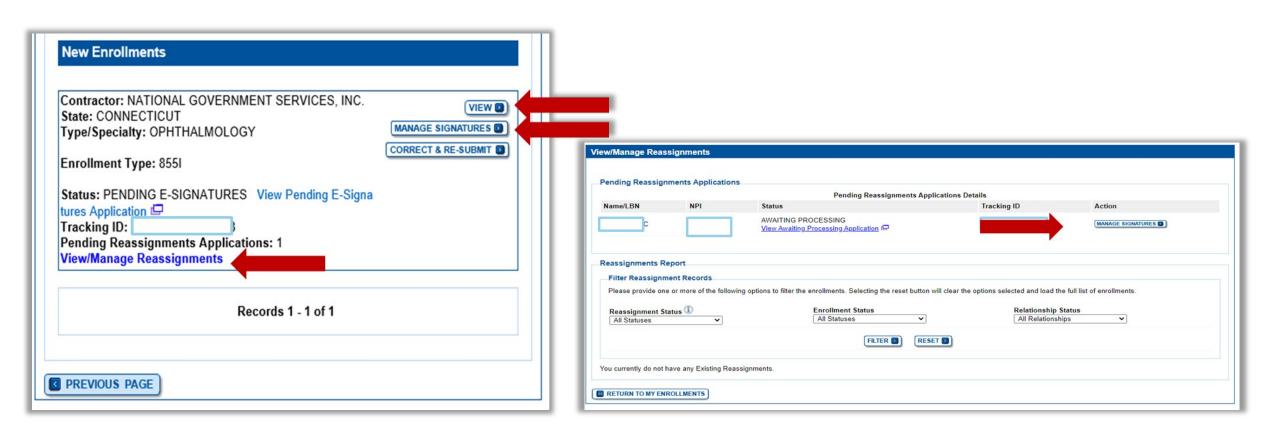
#### Verify All Signatures – Existing Enrollment



|                                  |                          | Pending Reassign  | nments Applications       | Details   |        |                    |
|----------------------------------|--------------------------|---|---------------------------|---|--------|--------------------|
| ame/LBN                          | NPI                      | Status  |                           | Tracking ID   | A      | ction              |
|                                  |                          | PENDING E-SIGNATURES <u>View Pending E-Signatures Application</u> □                     |                           |   |        | ORRECT & RE-SUBMIT |
| assignments f<br>Filter Reassign |                          |   |                           |   |        |                    |
|                                  | ne or more of the follow | ing options to filter the enrollments. Selecting the r  Enrollment Status  All Statuses | reset button will clear t | he options selected and load  Relationship  All Relations | Status | enrollments.       |
| Please provide o                 | ne or more of the follow | Enrollment Status   | ~                         | Relationship  | Status |                    |

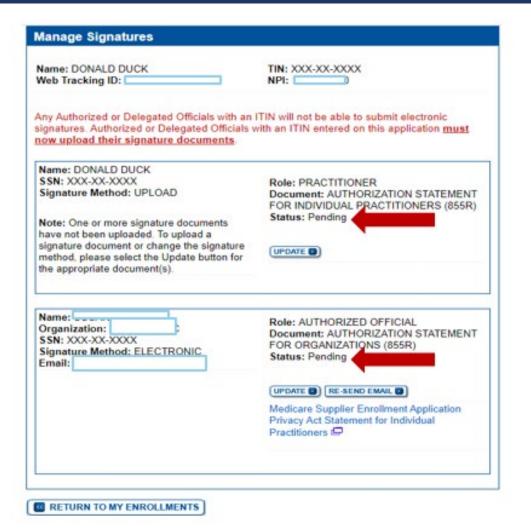


#### Verify All Signatures – New Enrollment





#### Signature Status

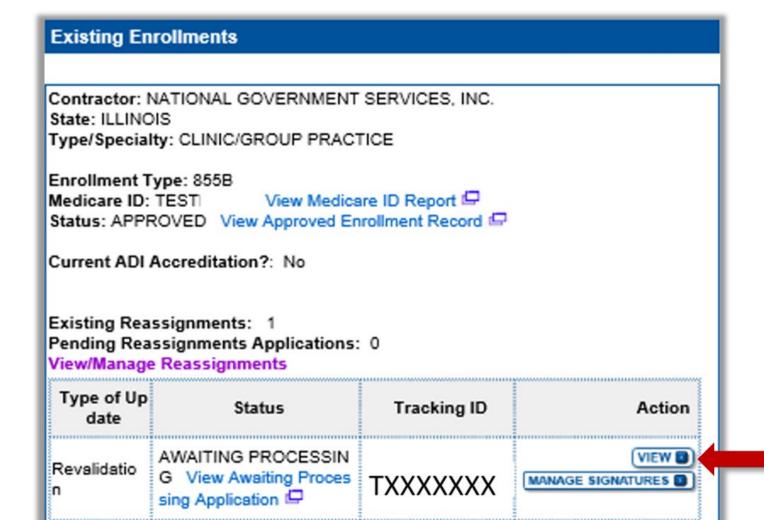






## Print Certification Statements

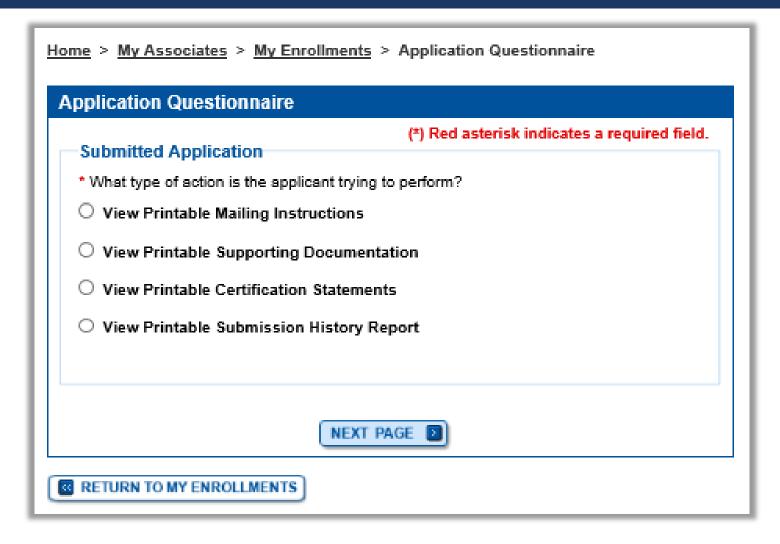
#### Enrollment Record







#### View Certification Statements







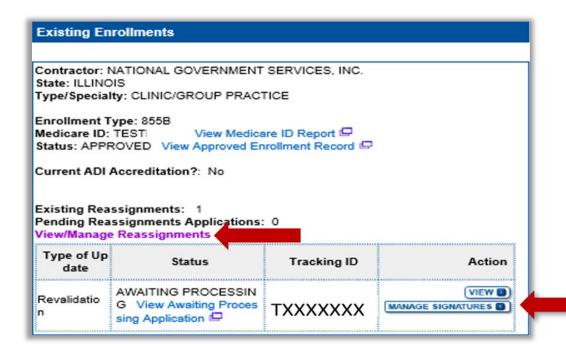
#### Print Certification Statements

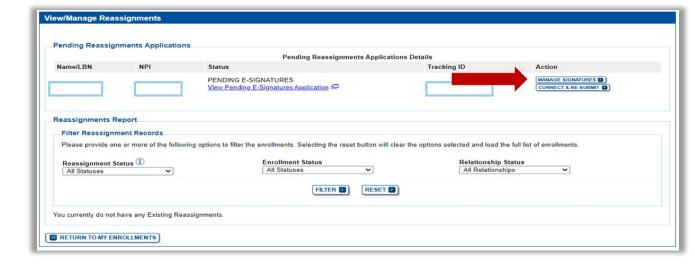




# Upload Certification Statements

#### Manage Signatures







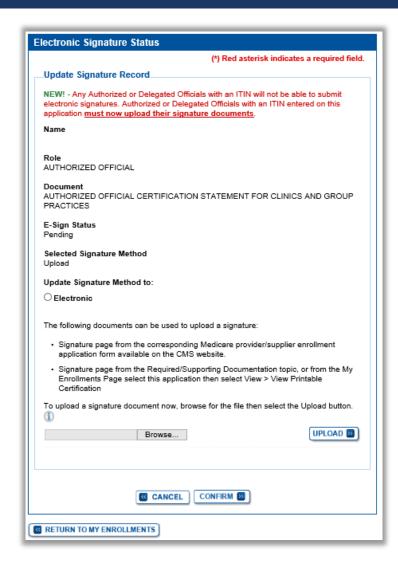
## Update

| Manage Signatures   |   |
|---|---|
| Name: DONALD DUCK<br>Web Tracking ID:   | TIN: XXX-XX-XXXX NPI  |
| Any Authorized or Delegated Officials with an I signatures. Authorized or Delegated Officials with an I now upload their signature documents.   |   |
| Name: DONALD DUCK<br>SSN: XXX-XXXX<br>Signature Method: UPLOAD  | Role: PRACTITIONER Document: AUTHORIZATION STATEMENT FOR INDIVIDUAL PRACTITIONERS (855R)                      |
| Note: One or more signature documents<br>have not been uploaded. To upload a<br>signature document or change the signature<br>method, please select the Update button for<br>the appropriate document(s). | Status: Pending   |
| Name: Organization: SSN: XXX-XXXX Signature Method: ELECTRONIC Email:   | Role: AUTHORIZED OFFICIAL<br>Document: AUTHORIZATION STATEMENT<br>FOR ORGANIZATIONS (855R)<br>Status: Pending |
|   | Medicare Supplier Enrollment Application Privacy Act Statement for Individual Practitioners                   |
| RETURN TO MY ENROLLMENTS  |   |





#### Upload Certification Statement







### Verify Signature Status

| Name: DONALD DUCK<br>Web Tracking ID:   | TIN: XXX-XX-XXXX<br>NPI:   |
|---|--|
| Any Authorized or Delegated Officials with an<br>signatures. Authorized or Delegated Officials<br>now upload their signature documents. | ITIN will not be able to submit electronic with an ITIN entered on this application must                                   |
| Name: DONALD DUCK SSN: XXX-XX-XXXX Signature Method: UPLOAD  File Name: Certification statement.pdf Date Uploaded: 02/26/2021           | Role: PRACTITIONER Document: AUTHORIZATION STATEMENT FOR INDIVIDUAL PRACTITIONERS (855R) Status: Complete Date: 02/26/2021 |
| Name: Organization: SSN: XXX-XX-XXXX Signature Method: ELECTRONIC Email:  | Role: AUTHORIZED OFFICIAL<br>Document: AUTHORIZATION STATEMENT<br>FOR ORGANIZATIONS (855R)<br>Status: Pending              |
|   | Medicare Supplier Enrollment Application Privacy Act Statement for Individual Practitioners                                |
|   |  |





# E-Signature Certification

## E-Signature Status

| Any Authorized or Delegated Officials with an I<br>signatures. Authorized or Delegated Officials w<br>now upload their signature documents. |  |
|---|--|
|   |  |
| Name: DONALD DUCK SSN: XXX-XXX Signature Method: UPLOAD  File Name: Certification statement.pdf Date Uploaded: 02/26/2021                   | Role: PRACTITIONER Document: AUTHORIZATION STATEMENT FOR INDIVIDUAL PRACTITIONERS (855R) Status: Complete Date: 02/26/2021 |
| Name: Organization: SSN: XXX-XXXX Signature Method: ELECTRONIC Email:   | Role: AUTHORIZED OFFICIAL<br>Document: AUTHORIZATION STATEMENT<br>FOR ORGANIZATIONS (855R)<br>Status: Pending              |
|   | Medicare Supplier Enrollment Application Privacy Act Statement for Individual Practitioners                                |





#### Resend E-Signature Email Confirmation





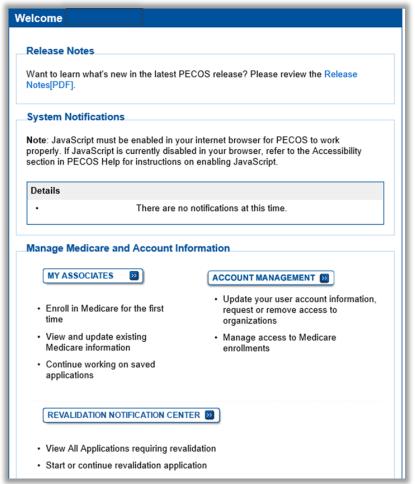


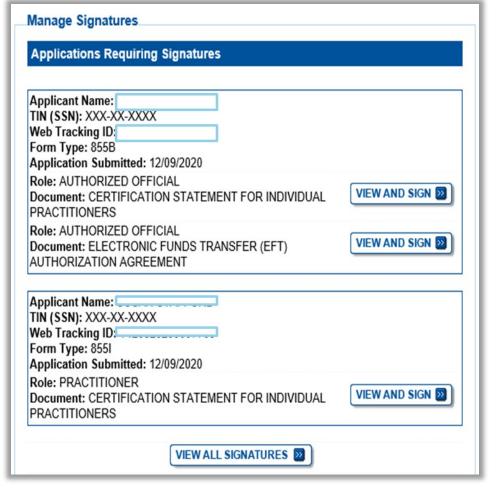
## E-Signature Email

| <b></b>   |   |
|---|---|
| From: customerservice-donotreply@cms.hhs.gov <customerservice-donotreply@cms.hhs.gov></customerservice-donotreply@cms.hhs.gov>  |   |
| Sent: Monday, September 13, 2021 3:39 PM  |   |
| To:   |   |
| Subject: PECOS Electronic Signature Request   |   |
| A Medicare application for authorized signer for this application for which CMS allows you to provide an electronic signature us signature.  Enrollment Application Information: Provider/Supplier Name: Provider/Supplier Specialty Type: CLINIC/GROUP PRACTICE State: IL  | ·   |
| Form Type: AUTHORIZATION STATEMENT FOR INDIVIDUAL PRACTITIONERS (855R) Practice Location Y, SPRINGFIELD, IL 627021507 NPI: Web Tracking ID Signatory Name: Signatory Role: PRACTITIONER Topic/s Changed: Reassignment   | The email will provide 2 options for e-signing the application:  1. Log into Internet-based PECOS using your existing PECOS ID and password  2. 2. E-sign via the PECOS e-signature website if you don't have an existing PECOS ID and password |
| Instructions: You may provide an electronic signature using your PECOS user ID at ( <a href="https://urldefense.com/v3/fiT0hi7FMWT9G5n6nBBooJyaUmsVvley1ND9jSg\$">https://urldefense.com/v3/fiT0hi7FMWT9G5n6nBBooJyaUmsVvley1ND9jSg\$</a> ) OR through the PECOS E-Signature website ( <a href="https://urldefense.com/v3/https://pecos.cms.cmsval/pecos/eSignLogin.do">https://pecos.cms.cmsval/pecos/eSignLogin.do</a> ;!!!Z3lH8c!nJWZzGu identifying information, e-mail address, and unique PIN | uzwfvG_QUbqrdGdMdDc2-fiT0hi7FMWT9G5n6nBBooJyaUmsVvlewFKprDXQ\$ ), using your  |
| Please note the PIN is valid for 14 days from the time the submitter completed the application. If 14 PIN or contact the submitter identified above.  | days or more have elapsed, you can access the PECOS E-Signature website to request a new  |



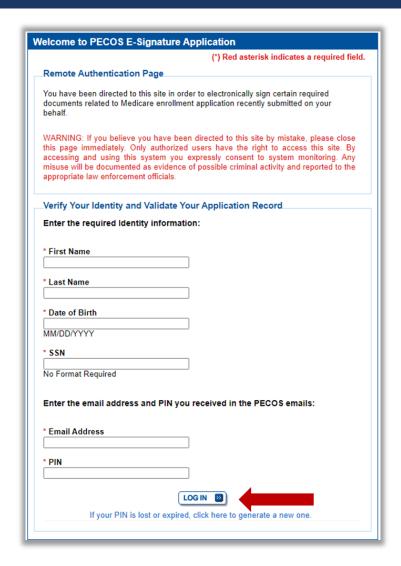
#### Login to PECOS







#### Copy PIN and Select Link





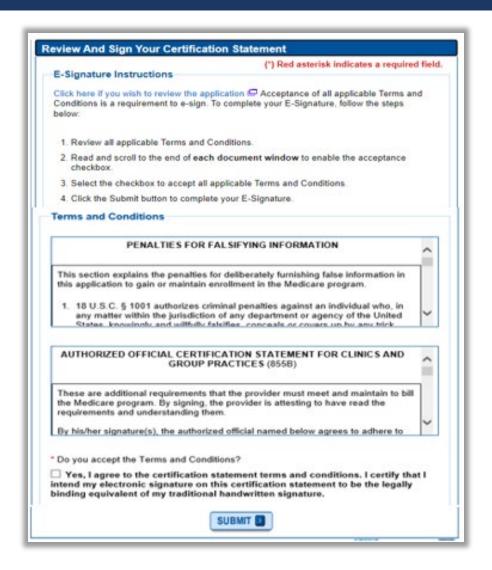


### Application Requiring Signature

| Applications Requiring Signatures |                   |
|-----------------------------------|-------------------|
| Applicant Name:                   |                   |
| TIN (EIN):                        |                   |
| Web Tracking ID:                  |                   |
| Form Type: 855B                   |                   |
| Application Submitted: 03/23/2021 |                   |
| Role: AUTHORIZED OFFICIAL         | N VIEW AND SIGN 2 |



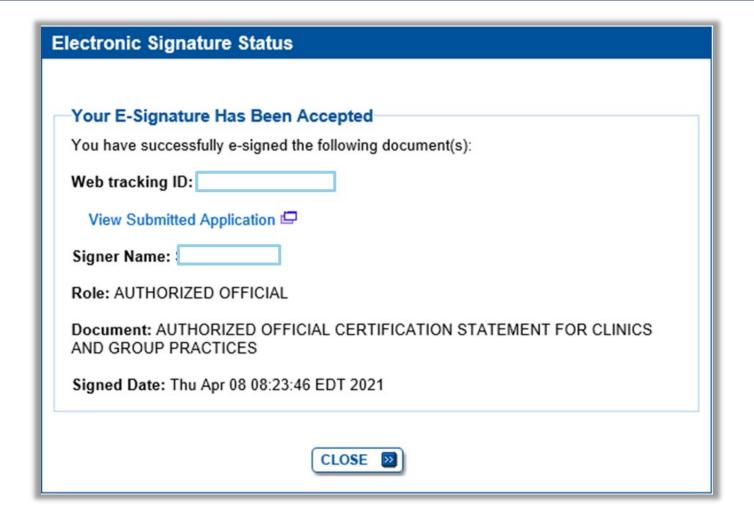
#### E-Signature Attestation







#### E-Signature Completion







# PECOS Application Status

#### PECOS Application Status









#### PECOS Self-Service Application

#### **PECOS Self Service Application**

#### Search and View PECOS Application Status

Providers/Suppliers may run simple search queries to retrieve and view the status of their PECOS application. For example, users may search for the application status by the NPI or Legal Business Name. There is no charge to use this functionality.

#### Search & View PECOS application status for an:

Individual

View the enrollment application status of an individual provider in an organization or private practice setting.

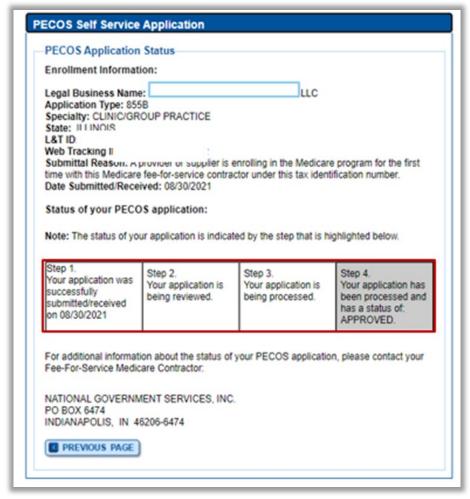
Organization

View the enrollment application status of an organization.



#### PECOS Application Status Steps

- Step 1
  - Received
- Step 2
  - Being Reviewed
  - Returned for Corrections
- Step 3
  - Entering Information In PECOS
- Step 4
  - Processed in PECOS and being transferred to claims system
  - Note: Wait for approval letter before you submit claims





# Request for Additional Information

## Email Request

- Email to Contact Person
  - customerservice-donotreply@cms.hhs.gov
- Information on Email
  - Tracking number, NPI, legal name, state and MAC
  - Instructions for request
    - ✓ States additional information needed
    - ✓ Directions on "How to Correct & Resubmit" in the PECOS system
  - Processor contact and phone number



## Respond to Request

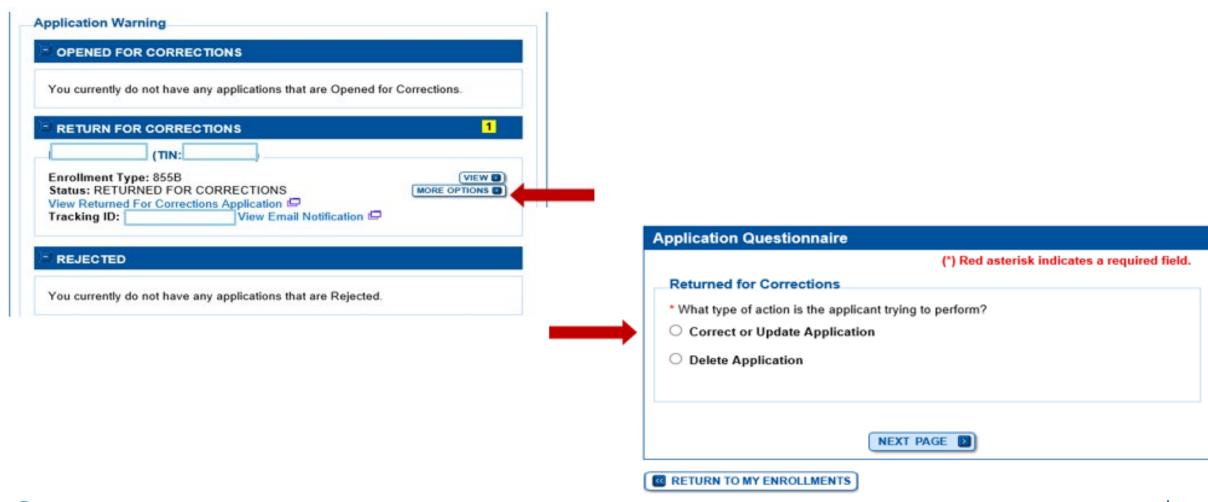
- Sign into PECOS
  - Select "Return for Corrections" or "Correct & Resubmit" button
  - Update Topics where needed
    - ✓ Upload missing supporting documents in PDF or TIFF format
  - Resubmit application to return for review to MAC
  - Verify all signatures are complete
    - ✓ Even if no signatures were required when resubmitting





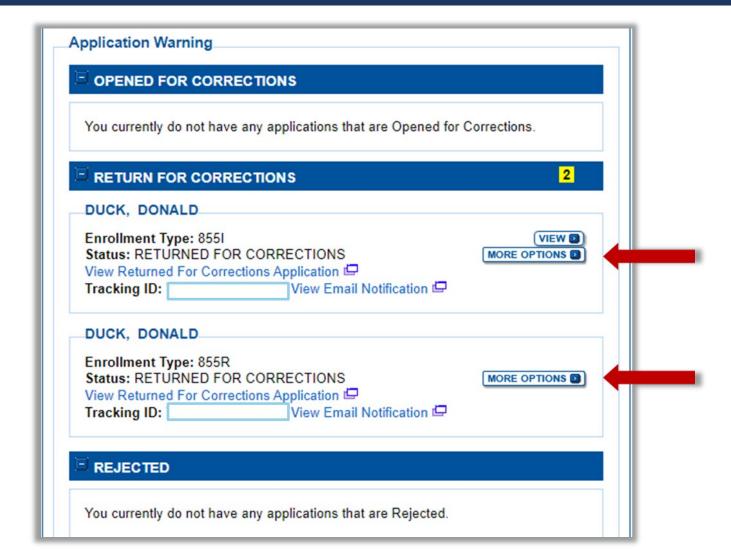
# Return for Corrections

# My Associates – Return for Corrections





# My Associates – Multiple Return for Corrections







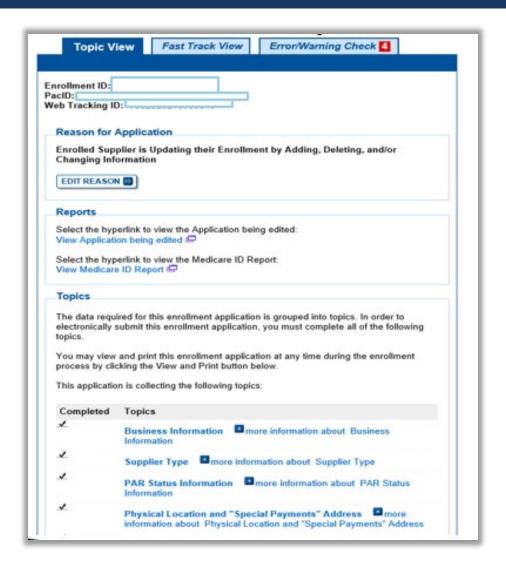
## Correct and Resubmit



| Pending Reassignments Applications Details                 |  |  |  |                              |  |
|--|--|--|--|------------------------------|--|
| me/LBN   | NPI                                    | Status   | Tracking ID  | Action                       |  |
|  |  | RETURNED FOR CORRECTIONS  View Returned For Corrections Application  |  | CORRECT & RE-SUBMIT DELETE D |  |
|  | Report                                 |  |  |                              |  |
| Please provide o   | ment Records<br>ne or more of the foll | owing options to filter the enrollments. Selecting the reset button wi   | manufacture and the second   |                              |  |
| Filter Reassign Please provide o Reassignment All Statuses | ment Records<br>ne or more of the foll | owing options to filter the enrollments. Selecting the reset button with the control of the cont | I clear the options selected and load the fu<br>Relationship Stat<br>All Relationships | tus                          |  |



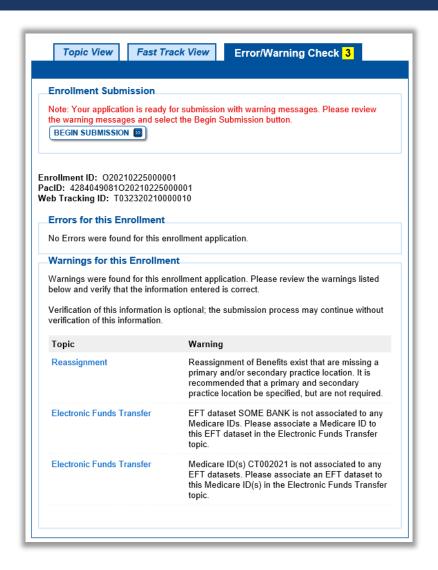
## Make Corrections or Upload Document(s)







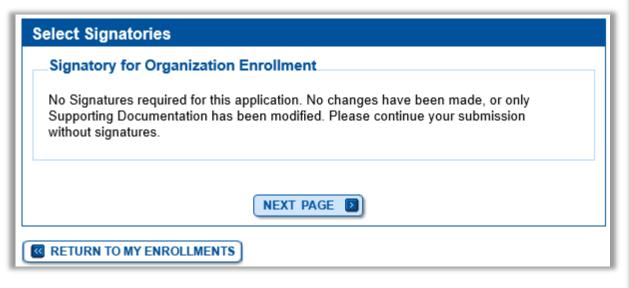
## Error/Warning Check Tab







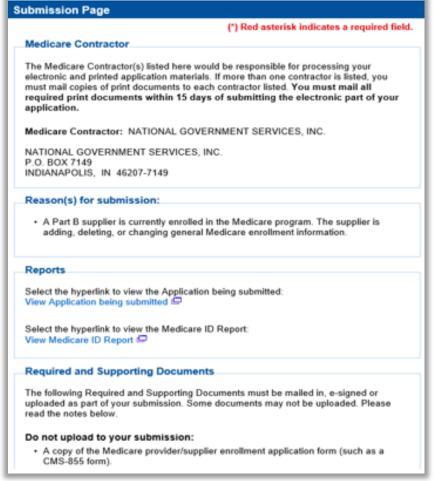
# Select Signatories







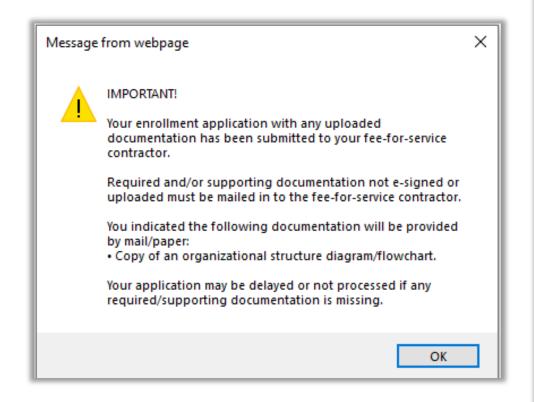
## Complete Submission

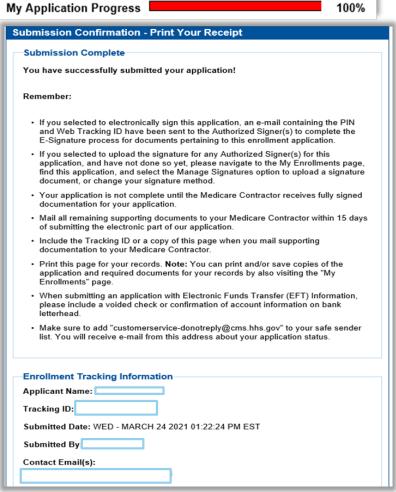






## Submission Confirmation

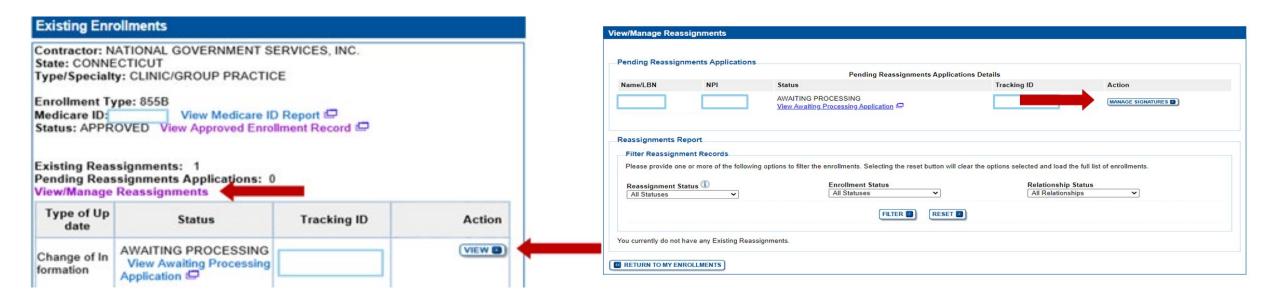






# Verify and Manage Signatures after Corrections

# Verify Signature Completed





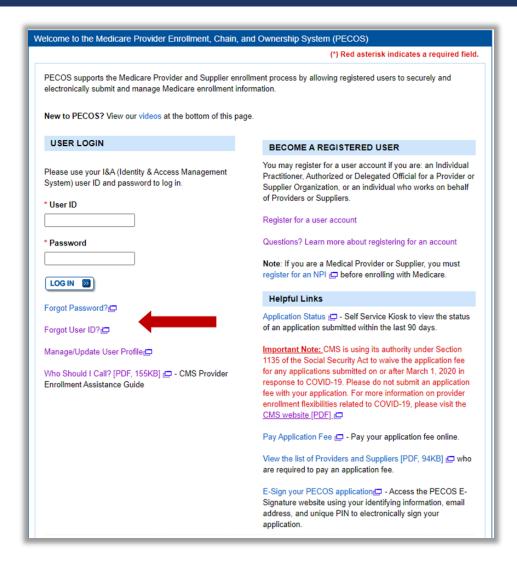
# Resources

## Internet-Based PECOS Tutorials

## **Enrollment Tutorials** Initial Enrollment: Step-by-step demonstration of an initial enrollment application in PECOS. Individual Provider 🗗 or Organization/Supplier 📮 · Change of Information: Step-by-step demonstration of how to update or change information for an existing enrollment already on file with CMS. Individual Provider 📮 or Organization/Supplier 📮 Revalidation: Step-by-step demonstration on how to submit your revalidation application using PECOS. Individual Provider or Organization/Supplier Deactivated: Example of how to deactivate an existing enrollment record. Individual Provider Reactivation: Step-by-step demonstration of how to re-enroll based on enrollment information that already exists in PECOS. Organization/Supplier Adding a Practice Location (DMEPOS Only): Demonstration of how to add a new practice location for DMEPOS supplier who is already enrolled with CMS. DME Supplier



## Online Account Self-Service Feature





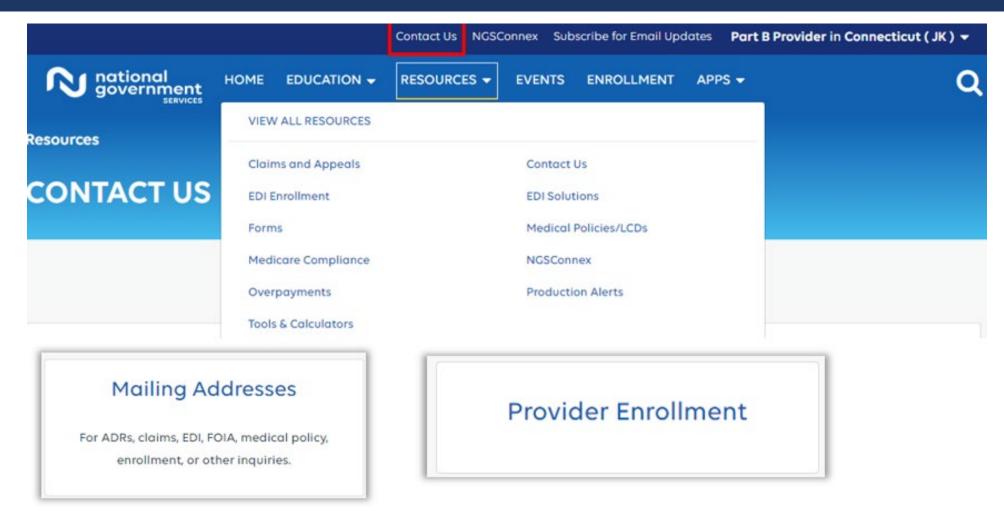




## **Contact Information**

| For Assistance With  | Contact           | Contact Information  |
|--|-------------------|--|
| <ul> <li>Changing an NPPES password</li> <li>Establishing a new user ID and password for NPPES</li> <li>Questions related to the NPI and/or application</li> </ul> | NPI<br>Enumerator | Phone: 800-465-3203<br>TTY: 800-692-2326<br>Email:<br>customerservice@npienumerator.com              |
| <ul> <li>Errors encountered<br/>while accessing or<br/>entering information in<br/>PECOS</li> <li>Forgotten PECOS user<br/>IDs and passwords</li> </ul>            | EUS Help Desk     | Phone: 866-484-8049 TTY: 866-523-4759 Email: EUSSupport@cgi.com Live Chat: https://eus.custhelp.com/ |

## NGS Website











Text NEWS to 37702; Text GAMES to 37702



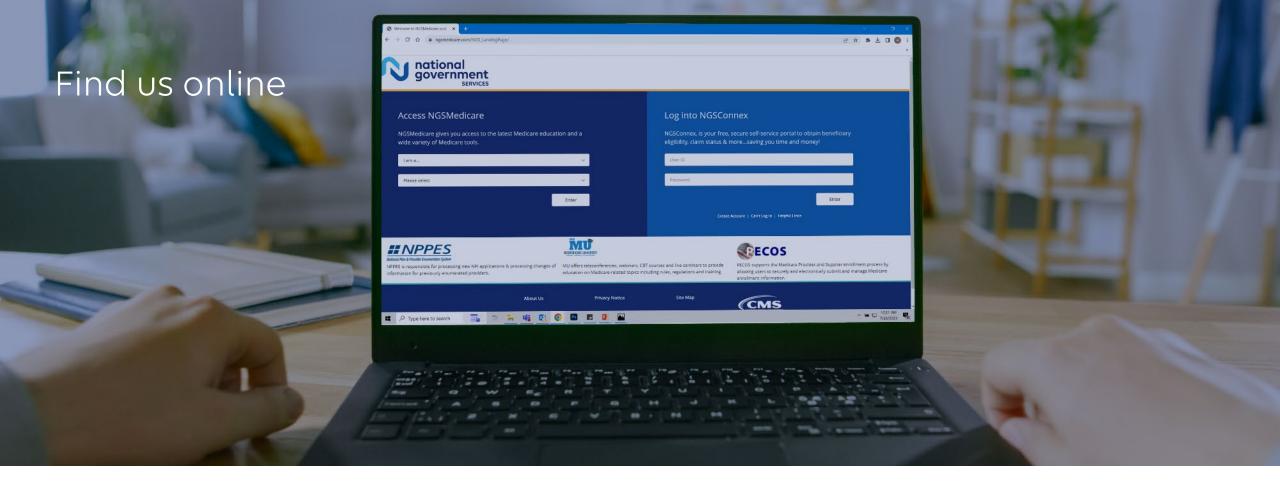
www.MedicareUniversity.com

Self-paced online learning











## www.NGSMedicare.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 NGSMedicare.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.